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ABSTRACT

This program guide is designed to assist vocational education and other interested agencies and institutions in establishing a coordinated and comprehensive system for the delivery of education and training to older persons. It consists of eight sections. Section 1 presents an overview of the purpose and organization of the guide as well as an introductory discussion of vocational education and the older population. Section 2, which is devoted to planning, covers policy development, needs assessment, goals and objectives determination, strategy identification, and resource procurement. Topics relating to coordination of service delivery examined in section 3 are agency identification, determination of incentives/barriers to coordination, selection of coordinative arrangements, and shared working relationships. Sections 4 and 5 outline development of outreach and recruitment and supportive services. The older adult as learner, facilitative instructional strategies, and instructional options are described in section 6. Section 7, which is devoted to employment services, contains discussions of placement, follow-up, and career development services. Involving older persons as volunteers, planning the volunteer program, and operating a senior volunteer program are examined in chapter 8. (MN)

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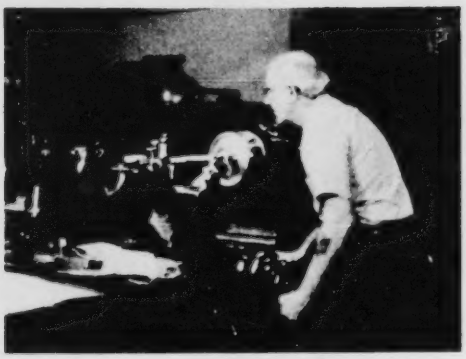
EDUCATION AND TRAINING FOR OLDER PERSONS

A PROGRAM GUIDE



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1. OVERVIEW

Americans are growing older. Declining birth rates, decreasing death rates and longer life expectancies have combined to increase the numbers of these euphemistically referred to as older Americans. The over-55 population is expected to increase twenty percent by the turn of the century.[1] By the end of the next half-century, the number of Americans over sixty-five will have doubled.[2]

These demographic trends can be anticipated to produce significant changes in the age distribution of adults. By 1990, those 55 and over will account for 27.1 percent of the civilian non-institutionalized population aged sixteen and older—a slight decline from the 27.2 percent in 1980. In contrast, the proportion of those young adults aged 16-24 can be expected to drop sharply from 21.8 percent in 1980 to 16.7 percent in 1990. Thus, in less than a decade, the ratio of older adults (65 and over) to young adults (16-24) can be expected to increase 30 percent—from 1.25 in 1980 to 1.62 in 1990.

OLDER AMERICANS PASSIVE OBSERVERS OR UNTAPPED RESOURCE

Two basic approaches can be taken to the contributions of older persons to American life. One approach assumes that retirement is a deserved reward for work and that older persons should withdraw from active work life to passively enjoy the returns of their labor. The other approach assumes that work is a part of life and that older persons should be provided needed educational and training opportunity to apply their talents and capabilities in a productive manner.

A number of social forces are impacting upon the economic opportunity structure for older persons. Some forces are serving to extend the opportunities for a productive work life; others are operating to restrain the extension of these opportunities.

Social Forces Influencing Work Opportunities [3]

Forces Tending to Restrain Extension of Work Life	Forces Tending to Prolong Work Life
1. Increased Social Security coverage	1. Legislation delaying mandatory retirement age
2. Liberalization of Social Security disability benefits	2. Increasing costs of Social Security system
3. Pension plans encouraging early retirement	3. Rising cost of living inducing workers to remain employed and nonemployed older persons to seek work
4. Age discriminatory practices in hiring	4. Increased health and longevity enabling older workers to work longer
5. A youth-oriented culture	5. Enlightened private sector employment and training practices recognizing the changing needs of older workers
6. Limited job openings due to sluggish economy	6. Increased educational opportunities resulting in better jobs and providing older workers a greater incentive to continue working
7. Negative stereotypes about limitations of older workers	7. Greater prevalence of older adults causing shift in youth oriented cultural values and norms
8. Inter-generational conflict between younger and older workers	

On the basis of available evidence, the forces acting to restrain the continued contribution of older Americans appear to be dominant. The labor force participation rate of older workers has undergone a drastic decrease. For men aged 55-64, the rate has declined from 94 percent in the 1930's to 83 percent in 1970. During the period 1970-77, the rate declined by nine percentage points and is projected by the Department of Labor to plummet to 65 percent by 1990. The situation is reversed, however, with respect to working women. The participation rate for women aged 55-64 increased from 27 percent to 43 percent during the two decades from 1950 to 1970 and has remained relatively constant thereafter.[4]

There are signs that the trend is not irreversible.

In a recent Harris poll:

- 51 percent of the employees surveyed indicated a preference for work rather than retirement;
- 48 percent of those 50-64 expressed a desire to continue working past 65;
- 46 percent of retirees said they would rather be working; and
- 53 percent of retirees wished that they had never stopped working.[5]

In an earlier survey, Harris found that of 4.4 million people who retired, two out of five had stopped work against their will. Forty-one percent of retired males did not want to quit work. Of those retirees who were poor and black, half had left unwillingly. Of the more than four million people over sixty-five who had retired, three out of ten desired paid work. From the sample results, he concluded that another two million were interested in serving as volunteers.[6]

Labor force participation statistics also tend to obscure the discouraged worker syndrome—those who become disillusioned about finding a job and retire from the labor force. Sheppard, in analyzing BLS unpublished data, reported a 162.5 percent increase from 1973-77 in the estimated number of discouraged workers.[7] He surmised that many move from the ranks of the unemployed to being discouraged and then to being self-defined as retired.

VOCATIONAL EDUCATION AND THE OLDER POPULATION

Older persons need and desire education and training. A 1974 Harris poll showed that twenty-nine percent of persons sixty-five and older who were still working wanted to learn new skills. Of those in the fifty-five to sixty-four age bracket, nearly two out of every five were interested in job training.[8]

The extent of vocational education responsiveness to the need of older persons is not documented. Enrollment data by age are not routinely collected as a part of the Vocational Education Data System (VEDS). Some state plans provide enrollment figures by age groupings. Most do not. Data from the 1978 *Report of Participation in Adult Education* indicated that approximately 40,000 adults aged 55 years and above were enrolled full-time in occupational programs of six months or more duration.[9] Data on part-time enrollments of older adults were not provided.

In 1977, the U. S. Commission on Civil Rights reviewed selected Federal programs for evidence of age discrimination. With regard to vocational education,

the Commission report recommended:

- That the Office of Education, based on data provided through State and local needs assessments, develop appropriate technical assistance strategies designed to assist State vocational education agencies to effectively work with its grantees to develop vocational education programs and activities to attract and to meet the needs of older persons;
- Failure of State vocational education agencies to respond to this initiative be regarded as a violation of the Age Discrimination Act.[10]

PURPOSE

It is the purpose of this document to assist vocational education and other interested agencies and institutions in establishing a coordinated and comprehensive system for the delivery of education and training to older persons. In recognition of the diversity inherent in the classification *'older person,'* the following definition will be used:

> Older persons refers to those individuals who have reached retirement age and seek re employment but lack readily employable skills, or those who have reached retirement age but have never worked or are underemployed due to lack of skills, or who have reached retirement age and desire a second career requiring new skills, or who face restricted access to and upward mobility in the labor market due to age.

This definition focuses on the diversity of older persons in need of education, training and employment. It includes the 65-year old executive who is forced to retire, but wants to continue working, the displaced homemaker of 55 who has been out of the job market for thirty years, the person of forty-two, retired from the military and seeking a second career, and the older worker forced out of employment prematurely through restructuring of the labor force. The diversity inherent in the definition emphasizes the many faces of the aging and the necessity to be responsive to the unique needs of each.

The document is written in the handbook style. The intent is to provide a variety of information and suggested methodologies so as to facilitate a rational and an informed approach to the delivery of employment and training services responsive to the multiple needs of older adults.

ORGANIZATION

The *Handbook* is organized into eight chapters. Each chapter addresses a major program activity involved in the delivery of education and employment services to older persons. Chapter Two is devoted to program planning. Coordination of service delivery is considered in Chapter Three. Outreach and recruitment are covered in Chapter Four with supportive services addressed in Chapter Five. Instructional methods are discussed in Chapter Six. Chapter Seven deals with employment services. The Handbook concludes with a discussion on older persons as volunteers.

The challenge to vocational education is clear.
Vocational Education Agencies and Institutions Can Choose to:

1. Focus their services on a youthful population.		1. Actively seek to meet the needs of an older clientele.
2. Treat older persons as an indistinguishable part of the service population.		2. Plan for provision of services to older persons as a special population grouping.
3. Adopt a passive 'open door' policy in attracting older adults.		3. Actively seek to find and recruit older adults.
4. Make no special instructional provision for older students.	O	4. Provide instruction adapted to educational background, experience and developmental abilities of older students.
5. Offer no special supportive services.	R	5. Seek to offer those support services as needed to attract and serve older adults.
6. Provide no special employment services in recognition of the employment problems of older workers.		6. Seek to overcome age stereotyping as barriers to employment of older workers.
7. Take no responsibility for coordinating program offerings with other providers of service to older Americans.		7. Establish coordinative linkages with other agencies concerned with provision of services to older persons.

NOTES

[1]New York Times, The. *National Recruitment Survey*. October 14, 1979.

[2]U. S. News and World Report. February, 1979.

[3]Work in American Institute Inc. *The Future of Older Workers in America — New Options for an Extended Working Life*. Scarsdale, NY: Author, 1980. pp. 6-7.

[4]Ibid., p. 35.

[5]National Committee on Careers for Older Americans. *Older Americans: An Untapped Resource*. Washington, DC: Academy for Educational Development. 1979, p. 7.

[6]Ibid., p. 6.

[7]U. S. Department of Labor, Employment and Training Administration. *Employment Related Problems of Older Workers: A Research Strategy*. R&D Monograph 74. Washington, DC: USDOL, ETA, 1979.

[8]Marilyn R. Block, and others. *Uncharted Territory: Issues and Concerns of Women Over 40*. College Park, Maryland: University of Maryland Center on Aging, August 1978.

[9]National Center for Educational Statistics. *Participation in Adult Education — 1978 Report*. Washington, DC: NCES, 1980.

[10]United States Commission on Civil Rights. *The Age Discrimination Study*. Washington, DC: Author, December, 1977, pp. 101-102.

2. PLANNING

Planning is the process of allocating resources to achieve intended results. The planning process involves the following sequential activities:

Planning to serve an older population can be accomplished using the above model as a guide. First, there must be policies that support and guide the provision of services to older persons. Next, the needs of older persons must be assessed. Goals and objectives as statements of intended results are derived from the statement of needs. Strategies for the achievement of intended results are identified. Finally, resources required to implement the chosen program are identified and acquired.

POLICY DEVELOPMENT

A policy is a statement of intent to implement a deliberate set of activities to achieve a desired end. Policy guides allocation of resources so as to produce social outcomes. Federal legislation has the force of policy in that mandated activities are generally intended to be used to achieve stated social purposes. State law and state education board enactments formulate policy in much the same way.

Policy describes the philosophical intent of vocational education. It also defines the specific missions of vocational education with regard to designated service populations, such as older persons. Without explicit policy on older persons, there is little likelihood that a commitment to equality of access and improved quality of service can be initiated or sustained.

Policy Issues

Formulation of policies to guide service to older persons should be based on consideration of the significant issues involved.

Some of These Issues are:	
Should:	**As Opposed To:**
1. programs for older adults be primarily for self-enrichment and personal growth	1. developing job specific skills to meet social and economic demands?
2. older adults be mainstreamed into regular vocational classes	2. offering special classes and supportive services tailored to their unique needs?
3. older persons be actively sought out as candidates for service	3. making no special effort to increase the number of older persons served?
4. vocational programs for older persons provide for a community service orientation including the possibility of voluntary service	4. concentrating on preparation for paid employment in regular jobs?

There are no absolute answers. Resolution of these and other policy issues will depend on community and institutional values, norms and preferences. The important point is that significant issues must be identified and resolved in order for meaningful policies to be developed.

Policy Development Cycle

Development of policy involves the following four activities:

1. DOCUMENTATION OF EXISTING POLICIES
2. ASSESSMENT OF EXISTING POLICIES
3. FORMULATION OF NEEDED POLICY STATEMENTS
4. FORMALIZATION OF POLICY

Documentation

The first requirement is that existing policies impacting on services to older persons be identified and documented. Policies may be found in a variety of sources including:

- State statutes
- Local ordinances
- State/local education board publications
- Minutes of State/local board meetings
- Codes of regulations, administrative procedures or other codified sources
- State/local vocational education plans, adult education plans and State/local agencies on aging plans
- Customs, precedents and standard operating procedures that have the force of policy

Since state and local boards have the power to interpret law, their regulatory and administrative actions can be regarded as policy in that they provide the framework for decisions.

Not all policies are well-documented. Customary ways of "doing business" may have the power of "de facto" policies yet never have been recorded. These customs and practices, once identified, should be written down. It is important to capture the essence of their intent, the activities covered, and the desired purpose to be achieved.

Policy assessment

Once current policies have been identified and documented, they should be assessed for adequacy, scope and content. To ensure adequate coverage, policies should be reviewed and assigned to specific categories according to their content. A suggested procedure is to

Classify Policies According To:

- Planning
- Coordination of Service Delivery
- Outreach and Recruitment
- Supportive Services
- Instruction
- Employment Services
- Volunteer Activities

The distribution across these topical areas will indicate extent of coverage. Topics in which relatively few or no policies exist identify areas in which policy development efforts should be directed.

In addition to scope, attention should be directed to the effect of existing policies. Present policies may facilitate or inhibit access of older persons to vocational programs suited to their needs. Therefore, policy should be reviewed to determine its effect on state and local efforts to provide quality programs to older persons. The review should focus on the impact of the policy on:

- **vocational education's willingness to serve older persons**
- **vocational education's ability to serve older persons;**
- **accessibility of existing vocational education programs;**
- **suitability of existing programs to serve older persons;**
- **coordination with external agencies.**

Policy formulation

Policies need be developed in those areas where: a) insufficient policies exist to provide adequate guidance, and/or b) existing policies are inhibiting delivery of improved services.

To facilitate policy developmental effort, examples of possible policy statements are provided for each major topical area.

Exemplary Policy Statements

- **Planning**
  - The needs of older persons should be given explicit consideration in the planning of vocational education programs, services and activities.
  - A written action plan for the provision of vocational education to older persons should be prepared.
  - Plans for the provision of vocational education to older persons should be developed in cooperation with area agencies on aging and other community organizations concerned with the needs of older persons.
  - Local advisory council membership should provide for the representation of older Americans.
  - State and local funds should be allocated to meet the basic costs of vocational education programs for older persons.

- **Coordination of Service Delivery**
  - Vocational education programs, services and activities should be coordinated with other public and private organizations providing services to older persons.
  - Working cooperative relationships should be established with area agencies on aging and other community services agencies using statewide cooperative agreements as the vehicle.
  - Vocational education should work cooperatively with employers and other community groups to ensure that the resources of older persons are productively employed.
  - Cooperative relationships should be established with sheltered employment facilities to provide support for those older persons needing such services.
  - Vocational education should coordinate with such agencies and services as are necessary to insure that a full range of supportive services is available to older persons so that they can profit from vocational education and training.

- **Outreach**
  - Vocational education should actively seek to serve all older persons who might profit from vocational programs, services and activities.
  - Procedures should be established for identifying, locating and advising older persons of all vocational education program options available to them.
  - Procedures should be adopted for processing referrals of older persons for vocational education from any public or private source.
  - Vocational education should seek to work with employers to serve older employees who may desire a second career.

- **Supportive Services**
  - Appropriate supportive services should be provided to assist older persons in benefiting from vocational education.
  - Opportunities for comprehensive vocational assessments should be provided each older person enrolled in vocational programs.
  - Career and retirement counseling should be provided older persons in conjunction with vocational assessment.
  - Local guidelines should be established governing use and interpretation of vocational assessment instruments and work evaluation measures as applied to older workers.
  - An assessment report should be prepared and used to assist older persons in the selection of appropriate vocational programs/services.
  - Sufficient qualified staff should be provided to conduct and/or assist in vocational assessment of older persons.

- **Instruction**
  - No persons shall be excluded from participation in an appropriate vocational program on the basis of age.

Exemplary Policy Statements *continued*

Instruction (continued)

- Admission requirements should be reviewed to ensure that they do not discriminate against older persons.
- Older persons should be provided with career exploration, career development planning and pre-vocational instruction as appropriate to their needs and interest.
- Schedules, curriculum, equipment and facilities should be modified as needed to enable older persons to participate successfully in vocational education.
- Special vocational programs should be provided for those older persons who can not achieve satisfactorily when mainstreamed into regular vocational programs.
- A broad range of instructional options for providing appropriate vocational education to older persons should be explored and utilized.

- **Employment Services**

- Job placement and follow-up services should be provided to assist older persons to secure and maintain satisfactory employment.
- Vocational education should work cooperatively with public and private employers to promote the hiring and retention of older persons.
- Vocational education should assist employers in the adoption of options that will extend the working life and productive capacity of older persons.
- Vocational education should actively seek to develop new career opportunities for older persons.
- Older persons should be provided assistance in the development of self-employment opportunities.
- Vocational education should seek new and innovative ways to utilize older persons in meeting community service needs.

- **Volunteer Activities**

- Vocational education should have lead responsibility in training older persons to function as community service volunteers.
- Vocational education should actively seek to make use of the skills and experiences of older persons as school volunteers.
- Opportunities for older people to provide voluntary assistance to community agencies and small businesses should be identified and communicated to the older clientele.
- Older persons should be encouraged to continue voluntary productive involvement in the economic and social life of the community.

Formalizing Policy

In order for policy to be effective it must first be accepted and formalized. Policies pertaining to older persons will require governing board approval and sanction. Support of the governing board in the early stages of policy development will facilitate final acceptance and formalization.

The following statements suggest means for gaining the support of governing boards.

Ways To Gain Support For Policy Formalization[1]:

- Present information on successful programs at other agencies or institutions.
- Describe the need of older persons for education through a compilation of facts and figures.
- Draw attention to the decreasing enrollments of younger students.
- Suggest the humanitarian commitment inherent in the provision of services to older persons.
- Use professionals already serving older persons in the community or older persons themselves to witness to the importance of serving older persons.

Strong support from the community is helpful when trying to get policies on older persons accepted and formalized.

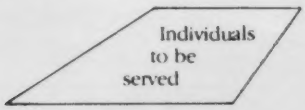
Examples of Possible Community Groups to Contact for Support:

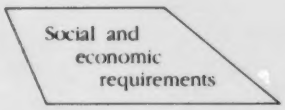
- Local council on aging
- Area agency on aging
- Community action agency
- Vocational rehabilitation office
- Senior centers
- Welfare department
- Public health department
- Social security office
- Corporations, businesses, chamber of commerce
- Unions
- Civic groups
- Charitable, religious/social welfare organizations
- Community action/planning associations
- CETA prime sponsor
- Clubs/groups/programs devoted to interests of older persons

NEEDS ASSESSMENT

Needs of older persons must be identified before programs and services can be offered to address those needs. Needs are defined as *'gaps'* between desired and actual outcomes. Needs assessment, then, is the process of determining the difference between *'what ought to be'* and *'what is.'*

How one defines needs depends upon the perspective selected. In vocational education, needs are defined from two perspectives:





Because needs assessment procedures differ depending upon whether individual or socioeconomic needs are being considered, they will be treated separately.

Individual Needs

Assessment of older persons' needs varies depending upon the *focus* selected and the *type of data* utilized.

Focus

Focus of a needs assessment refers to the specificity with which the population-in-need is defined. Needs may be defined for a designated target group of older people or for a larger but less well-defined grouping.

Uses of:	
Targeted Approach	**General Approach**
• Middle-aged workers seeking second careers • Retirees seeking full-time or part-time employment • Unemployed • Urban/rural poor • Minorities • Displaced homemakers • Displaced workers • Handicapped • Infirm elderly • Homemakers	• All persons above an arbitrary age residing in a specific geographic area • All persons experiencing age discrimination

The choice of a targeted or general approach to assessing needs of older persons is dependent upon whether identified needs are to be confined to a specific group or generalized to a larger population.

Reasons for:	
Focused Approach	**General Approach**
• Identified community problem may dictate specific target group; e.g. middle-aged workers unemployed because of a plant closing • Funding agencies may designate priority groups • Advocacy groups may press for service to specific groups	• May be able to 'tag on' to an existing needs assessment effort • No strong rationale for a prior selection of target groups • May be unable to physically locate specifically defined groups of older persons

Type of Data

Data collected in a needs assessment can be either from secondary or primary sources. Secondary data is that already collected and published. Primary data is that collected directly by the agency doing the needs assessment. It is less expensive to use secondary data, but secondary data may not be current or the data for a specific target group needs assessment may not be available from a secondary source.

SECONDARY DATA SOURCES RELATING TO OLDER PERSONS

Federal Data Sources

COMMUNITY SERVICE ADMINISTRATION	
Annual CSA/OEO Poverty Tabulations from March Current Population Survey	Includes data items on income, work experience and personal characteristics (age, race, sex and family status). Refer to Community Services Administration library and Bureau of the Census Population Division/Poverty Section.
DEPARTMENT OF AGRICULTURE	
Farm Population of the United States	Total rural farm population, agricultural employment status, age, race, sex, class of workers, family relationships, fertility, and family incomes. Contact the Bureau of Census or Department of Agriculture.
DEPARTMENT OF COMMERCE	
Bureau of Census	
1980 Decennial Census	Data on older persons found in: Characteristics of Population; Subject Reports; Housing Characteristics.
Current Population Surveys	Monthly information on the status of the labor force, provides a regular means of updating census data.
Population Estimates and Projections	Data on age distribution tabulated at national level by single year of age to 85+; State level by age groups to 65; county level to under 65, 65+.
DEPARTMENT OF EDUCATION	
National Center for Education Statistics	
Participation in Adult Education	Extent of participation in adult education as well as demographic, economic and social data usually collected by Current Population Survey.
Characteristics of Students in Non-collegiate Postsecondary Schools	Information provided on demographic characteristics, work history and plans, educational history and plans, reasons for selecting program/school, labor force status, current job.
DEPARTMENT OF HEALTH AND HUMAN SERVICES	
Administraton on Aging	
Estimates of Elderly Population for Counties and Planning and Service Areas	Estimates of 60+ and 65+ by counties or group of counties. Available upon request.
Statistical Reports on Older Americans Series	Data for those 60+ or 65+ on income, education, employment, Federal outlays in aging, poverty thresholds, health expenditures, population characteristics, poverty status, population trends, older American Indians. Reports available upon request.
Health Care Financing	
Current Medicare Survey	Data collected from aged and disabled, 65+. Includes data on demographic characteristics, health services (types & costs).
National Center for Health Statistics	
Health Interview Survey	Illness, accidental injuries, disability, use of hospital, medical, dental and other services.
Health and Nutrition Examination Survey	Demographic characteristics of all persons in household, medical history, diet.
National Nursing Home Survey	Data includes patient characteristics and functional status, participation in social activities.

Federal Data Sources (continued)	
SOCIAL SECURITY ADMINISTRATION	
Continuous Work History Sample	Demographic characteristics, employer information; type of work information; earnings information; self-employment information; geographic information.
Longitudinal Retirement History Study	Data provided on demographic characteristics, living arrangements, labor force experience, retirement status.
Survey of New Beneficiaries	Includes information on current, last, longest job; reasons for leaving last job; income sources and amounts, earning histories.
Longitudinal Supplemental Security Income File	Data items include disability history, income and resources data, mobility and living arrangements.
DEPARTMENT OF JUSTICE	
Uniform Crime Report	Annual collection of data on serious crime by age, sex, race and classification of offence.
DEPARTMENT OF LABOR	
Characteristics of Insured Unemployed	Data provided by major industry, age, sex, race, occupation, duration of unemployment.
Current Population Survey (Conducted by Census for the Bureau of Labor Statistics)	Monthly data included on age, sex, race, ethnicity, marital status, occupation, industry and employment status.
State Data Sources	
STATE AGENCY ON AGING	Possible source of information on demographic, economic and social characteristics of older persons
STATE DATA CENTER	Collection of State agency generated statistical reports and data as well as Census reports and surveys
STATE EMPLOYMENT SECURITY AGENCY	Source of employment data dealing with numbers and characteristics of the population, the labor force, economically disadvantaged, special worker groups and the unemployed

Use of primary data to assess needs requires that original data be collected. Several methods data are available. Each has its advantages and disadvantages. Each should be weighed carefully when choosing a particular method.

PRIMARY DATA METHODS

A. Sample survey of older persons using mail-out questionnaires

Advantages/Disadvantages

1. Can cover a wide geographic area
2. Relatively inexpensive
3. Can generalize to larger population

Cautions

1. Likelihood of low response rate
2. Difficult to ensure that survey will focus on desired target group(s)
3. Generalizability depends on representativeness of sample

B. Interview of selected sample of older persons (either personal or phone contact)

Advantages/Disadvantages	Cautions
1. Higher response rates; not dependent upon respondent literacy	1. Requires trained interviewers
2. Greater flexibility (can probe for more information or can restate as necessary)	2. May be difficult to locate older persons who belong to designated target group(s); e.g., may not have phones
	3. More expensive per person contacted than survey

C. Conduct interviews with articulate spokespersons who are knowledgeable of designated groups of older persons

Advantages/Disadvantages	Cautions
1. Efficient means of gathering information	1. Validity of information depends upon credibility of spokesperson's experience
2. Provides first-hand insight into the dynamics of older persons' needs	2. Spokesperson's knowledge may not generalize to population of concern
	3. May be difficult to locate articulate spokespersons with creditable knowledge

Regardless of the method, the data elements to be included must be planned prior to collection. Choice of items for inclusion in a needs assessment survey depends upon the purpose to be served. For example, if the intent is to focus on barriers to accessibility, then data items should be chosen accordingly. Limitations on the length of the assessment form will force trade-off considerations between scope and extent of coverage of need areas included.

Suggested Types of Data Elements	Examples of Data Items
Expressions of need/concern/interest for work and/or employment	• I have considered going to work • I am interested in volunteer service activities • I would like a part-time job • I would like my own business
Activities that would satisfy expressed need/concern/interest	• Seeking regular employment • Volunteer work several times a week • Self-employment • Seeking career counseling • Attending full/part-time vocational program
Interest in vocational programs	• List of program descriptions from which to indicate interest
Factors that inhibit enrollment in a vocational program	• Scheduling • Transportation • Limited course offerings • Admission requirements • Study demands
Biographic data	• Name • Address • Employment status • Educational history

Socioeconomic Needs

The necessity to be concerned with a separate socioeconomic needs assessment depends upon the declared purpose of serving older persons. If the purpose is to provide necessary support to enable older persons to function in regular programs, then no separate needs assessment is required. The assessment of needs that provided the rationale for offering the regular program is sufficent. If, however, a new or a substantial revision in an existing program is contemplated, then a separate assessment of needs is justified.

In vocational education, socioeconomic needs correspond to the need for providing trained individuals to fill certain jobs. Typically, employment demand is estimated from secondary data sources or from a survey of local employers. The techniques for doing employment demand surveys have been thoroughly discussed in the literature. The reader is referred to these external sources for additional elaboration.

GOAL AND OBJECTIVE DETERMINATION

Goal Characteristics

A GOAL is a results-oriented statement of intent. Goals are usually written and provide a general description of an outcome selected to satisfy a need of a particular group.

Goal statements should clearly designate:

- **Who is to be served? (Target group identification), and**
- **What is the desired outcome to be attained? (Intended effect of vocational education).**

Possible vocational education outcomes for older persons include:

- Development of entry-level job skills
- Increased opportunities for second careers
- Improvement of basic education skills
- Reduced age stereotyping in the public and private sector
- Expanded use of older workers as a source of labor supply
- Utilization of older volunteers
- Heightened awareness of job requirements and opportunities
- More older persons placed in productive, well-paying jobs
- Enhanced growth in positive self-image and sense of social belongingness
- Greater knowledge of consumer and homemaking affairs
- Decreased length of unemployment

Since vocational outcomes generally pertain to desired changes in people or society, goal statements should contain a results-oriented verb. Use of results-oriented verbs serves to identify the direction of desired change.

VERBS COMMONLY USED WITH GOALS

Increase	↑	↓	Decrease
Expand			Reduce
Enhance			Diminish
Develop			Lessen
Improve			Shorten
Equalize			Curtail

Formulation of goal statements requires that expected outcomes be linked with specified target groups. Target groups should already have been identified as part of the needs assessment activity.

Example of a Typical Goal Statement:

To decrease the length of unemployment	of	older workers displaced from their jobs.
Outcome		Target group

Characteristics of Objectives

An OBJECTIVE is a detailed and specific description of an outcome. It is usually written and describes the intended product or products in objective and measurable terms. There may be several objectives for each goal, but it is usually good planning practice to specify no more than three or four objectives for each goal.

Objectives are the means for the achievement of vocational goals. It is the focus on means rather than final outcomes that provides the basic distinction between goals and objectives.

DISTINCTION BETWEEN GOALS AND OBJECTIVES

Goals	*describe*	desired ends stated as vocational education outcomes.
Objectives	*describe*	means selected to accomplish desired ends.

Objectives should state: a) what action is to be taken to achieve the goal; b) what measurable results are anticipated to be achieved by the action; and c) during what time period the results are to occur.

To illustrate how objectives differ from goals, consider the goal:

To develop the occupational skills of retirees seeking to initiate a second career.

A set of objectives supportive of the goal attainment might be:

- to engage in a recruitment campaign that will result in the enrollment during the FY school year of at least twenty retirees desirous of learning new occupational skills;
- to provide transportation assistance during the school year to all students above 60 years of age who request such services;
- to place at least eighty percent of all completers of occupational programs desiring employment in a related occupation within three months of program completion.

Objectives should begin with strong, action-oriented verbs that describe an observable or measurable behavior. The following list illustrates the broad range of educational actions that are supportive of goal attainment.

VERBS COMMONLY USED WITH OBJECTIVES

design	implement
prepare	place
involve	serve
inform	support
offer	encourage
provide	enable
stimulate	communicate
link	coordinate

How to Formulate Goals and Objectives

Step 1: Assign responsibility to a designated group.

Responsibility for the formulation of goals and associated objectives should be assigned to a specific group. Group members should be those who share a professional interest and concern in serving older persons. Potential participants might include representation of the following:

- school board
- local vocational advisory council
- local unit on aging
- county/city council on aging
- local advocacy groups for older persons
- community program(s) serving an older person clientele
- older person target populations

Step 2: Provide descriptive information.

In order to ensure that goals/objectives are derived from best available evidence, data collected during the needs assessment should be analyzed and presented in summary form for each older persons target group identified. Information should be presented in the form of descriptive statements such as:

(Name of target group) constitutes _____ percent of total population.

The mean income of (name of target group) is $ _____ .

_____ percent of the target group desire employment.

(Name of target group) constitute _____ percent of current enrollment in vocational education.

Step 3: Identify needs of target group that should be the concern of vocational education.

Based on the information presented, the group is asked to identify the needs that should be served by vocational education. Needs may be individually generated by each group member and then discussed or generated spontaneously from group interaction.

Step 4: Define the vocational education outcomes that will best serve identified target group needs.

Once needs are identified, outcomes considered to satisfy these needs should be identified. As a general rule, no more than two or three outcomes should be specified for each target group need. Outcomes may be formally solicited from each group member or generated from impromptu group discussion. In the case of disagreement between group members, an attempt should be made to secure consensus on the suitability, feasibility and general intent of the outcome statement. Only those outcome statements on which consensus is obtained should be retained for further consideration.

Step 5: Formulate objectives for each goal.

Once outcomes have been defined, they can be translated readily into goal statements by linking the outcomes with the corresponding target group. Objectives then should be formulated for each goal. The group must ensure that objectives are measurable and specific and will serve the goals formulated in Steps 3 and 4. Each objective should state only a single aim or purpose and should specify a single end product or result to be attained.

STRATEGY IDENTIFICATION

A strategy is a specific course of action related to the accomplishment of a desired objective. Since there are generally several ways that a given objective can be achieved, a specific strategy to be followed must be chosen from a set of viable alternatives. The choice should be based on a comparison of the relative effectiveness and efficiency of each alternative.

Major Vocational Service Strategies

Vocational education has a variety of service strategies for meeting the needs of older persons. These include:

Instructional programs
- Occupational skills/knowledge development
- Consumer and homemaking skills/knowledge development
- Basic and remedial skills/knowledge development
- Employability skills/knowledge development
- Community service volunteer training

Supportive services
- Occupational awareness and exploration
- Self awareness
- Career choice
- Individual assessment
- Aspiration and motivation
- Transportation services
- Aid and other assistance

Outreach and recruitment
- Public relations
- Publicity
- Admission standards
- Employment services
- Placement
- Job follow-up
- Job development/design
- Elimination of age barriers

Program improvement activities
- Experimental/developmental/pilot programs
- Curriculum design
- Instructional materials development

Capacity building
- In-service training
- Equipment/facilities acquisition
- Community linkages

Choosing an Appropriate Strategy

Strategies for meeting the objectives must be reasonable, practical and realistic. At a minimum, criteria for the evaluation of alternative strategies should include consideration of:

- **Resources**
- **Costs**
- **Advantages/Disadvantages**

The process of strategy selection can perhaps best be illustrated by example. Suppose that a desired objective is:

Objective: To personally contact at least 100 older adults during the 19 _____ school year and inform them of vocational educational opportunities in their community.

Some possible strategies for implementing this objective and the criteria against which they can be evaluated are illustrated below:

Strategy	Resource Requirements	Costs	Advantages/ Disadvantages
Place a notice in monthly bank statements of cooperating banks	Cooperation of local banks	Printing Staff time to contact banks and provide notices	Printed information disseminated at low cost Limited information can be disseminated Many older persons may not be reached
Set up information booths in local shopping malls	Suitable sites Booths or other suitable meeting area	Staff time to operate booth Construction materials Staff transportation	Personal contact will provide for exchange of information Rural communities may be excluded Older persons may not shop frequently at shopping centers
Develop and mail a brochure describing program offerings	In-house production facilities	Staff time to design and disseminate brochure	Controlled dissemination of information May not be read by older persons

A Group Process for Strategy Identification and Choice

Step 1. Establish one or more groups.

Groups of five to nine members should be formed. The number of groups depends upon the number of objectives pertaining to older persons. Groups composition should be similar to that used in goal/objective determination.

Step 2. Select major vocational service strategies.

For each objective, the group should select a major vocational service strategy thought to best meet the intent of the objectives. The purpose is to facilitate choice by first selecting a major service strategy and then providing for subsequent refinements. The process is best served if the initial selection is restricted to a single service strategy. The list of major service strategies is not meant to be exhaustive. If others are identified in group discussion, they should be included.

Step 3. Identify specific service alternatives.

For each major service strategy selected in Step 2, the group should seek to identify more specific stated service alternatives. Each alternative should define a specific action that could be taken by the educational agency/institution. The implications of each action should be estimated on certain key factors. At a minimum, these **key factors** should include: 1) **the resources required,** 2) **the costs likely to be incurred,** and 3) **the anticipated advantages/disadvantages that would accrue**. Estimates should be based on best available evidence. In some instances, this may be only a pooled "best guess." The important point is that alternatives be assessed according to common criteria systematically applied.

Step 4. Choose a specific alternative.

The alternatives should be comparatively evaluated by the group using the key factors identified in Step 3. Those alternatives judged to require more resources (staff, equipment, facilities) than available or likely to be acquired and/or whose cost is considered unreasonable should be rejected. For those remaining, the alternatives with the least restrictive disadvantages should be chosen.

RESOURCE PROCUREMENT

Before planned strategies for serving older adults can be implemented, necessary resources must be secured. Resources can be either of a financial or non-financial nature. Non-financial resources include personnel, equipment, materials, facilities and accumulated 'know-how.' Securing necessary resources involves location of available resources and acquisition of resources.

Resource Locations

Location strategies differ for financial and non-financial resources. Each will be considered.

Financial Resources

When considering financial sources, Federal assistance is the most inclusive. Major Federal sources for assistance are described below in terms of: a) administrative agency and legislative authority, b) authorized uses of funds, and c) application procedures.

Federal Funding Sources for Education/Training Service

Administrative Agency Legislative Authority Program Name	Authorized Programmatic Uses	Application Procedures
Department of Education Office of Vocational and Adult Education Vocational Education Act as amended - Subparts 2 and 3 Vocational Education Basic Grants to States	Vocational education programs, work study programs, cooperative vocational education programs, energy education, placement services, industrial arts, support services for women; research, exemplary and innovative programs, curriculum development; vocational guidance and counseling; vocational education personnel training; grants to overcome bias.	Funding by State based on program services/activities contained in approved local plan. Contact local education agency or institution.
Department of Education Office of Vocational and Adult Education Vocational Education Act as amended - Part A Subpart 5 Vocational Education Consumer and Homemaking	Consumer education, food and nutrition, family living and parenthood education, child development and guidance, housing and home management, clothing and textiles, and supportive auxiliary services.	Funding by State based on program services/activities contained in approved local plan. Contact local education agency or institution.
Department of Education Office of Vocational and Adult Education Vocational Education Act as amended - Part B Subpart 3 Bilingual Vocational Education	Bilingual vocational training programs and training allowances for program participants.	Discretionary grants program. Contact Secretary of Education.

Administrative Agency Legislative Authority Program Name	Authorized Programmatic Uses	Application Procedures
Department of Education Office of Vocational and Adult Education Adult Education Act as Amended Education Amendments of 1978, Title XIII Part A Adult Education Adult Education Grants to States	Education and training programs to assist adults in acquiring functional basic skills, completing secondary school and in becoming more employable, productive and responsible citizens.	Funding administered by State. Contact State adult education agency.
Discretionary Grants	Research, development, evaluation and dissemination; special projects for elderly; programs for adult Indians, Indochina adult refugees and adult immigrants.	Discretionary grants program. Contact Secretary of Education.
Department of Education Office of Consumer Education Consumer Education Act of 1978 Consumer Education	Consumer education programs, curriculum development, demonstration projects, dissemination, preservice and inservice training, auxiliary services.	Discretionary grants program. Contact Secretary of Education.
Department of Education Law-Related Education Act of 1978 Law-related Education	Law-related education programs for non-lawyers, curriculum development; pilot and demonstration projects; dissemination; preservice and inservice training; involvement of law-related organizations/agencies/personnel.	Discretionary grants program. Contact Secretary of Education.
Department of Education Office of Environmental Education Environmental Education Act of 1978 Environmental Education	Environmental education programs, curriculum development; dissemination; preservice/inservice training; planning of outdoor ecological study centers; community education programs on enviromental quality, preparation and distribution of materials.	Discretionary grants program. Contact Secretary of Education.
Department of Education Health Education Act of 1978 Health Education	Health education programs to promote physical health and well being and to prevent illness and disease.	Discretionary grants program. Contact Secretary of Education.
Department of Education Office of Career Education Career Education Incentive Act Career Education	To make education as preparation for work major goal of all who teach and all who learn by increasing the emphasis on career awareness, exploration, decision making and planning, and to do so in a manner to create equal opportunity.	Contact State Education Agency.
Department of Education Correction Education Demonstration Project Act of 1978 Correction Education	Demonstration projects providing academic and vocational education to correction inmates.	Discretionary grants program. Contact Secretary of Education.
Department of Education Office of Bilingual Education Bilingual Education Act Bilingual Education	Bilingual adult education programs; personnel development; planning and technical assistance; research and development.	Discretionary grants program. Contact Secretary of Education.
Department of Education Community Schools and Comprehensive Community Education Act of 1978 Community Schools	Educational, cultural, recreational, health care, use of school facilities for community activities; preventive health, dental care and nutrition; special programs for older persons; services for handicapped or other health impaired clients; rehabilitation purposes; improved relations between schools and communities; leisure education.	Apply to State education agency and/or apply to Secretary of Education.

Administrative Agency Legislative Authority Program Name	Authorized Programmatic Uses	Application Procedures
Department of Education Women's Educational Equity Act of 1978 Woman's Educational Equity	Demonstration, development and dissemination activities that increase full participation of women in American society; guidance and counseling; activities to increase opportunities for unemployed and underemployed women; expansion of improvement of educational programs for women in vocational and career education.	Discretionary grants program. Contact Secretary of Education.
Department of Education Higher Education Act as amended – Title I – Part B Education Outreach Programs Continuing Education	Continuing education programs; removal of barriers caused by rural isolation; provision of legal, vocational and health educational services; educational and occupational information and counseling services; dissemination of information on educational opportunities; community education activities; provision of postsecondary education to older individuals as well as other educational needs which have been inadequately served; services to women at the place of employment.	State grants. Contact State agency designated as grants administrator.
Federal Discretionary Grants	Develop and evaluate innovative delivery systems to increase access of under-served adults; expand range of education and community resources used; stimulate and evaluate creative approaches to removal of access barriers; provide preservice and inservice training.	Discretionary grants program. Contact Secretary of Education.
Department of Education Higher Education Act of 1965 as amended – Title IV Student Assistance Student Financial Aid	'Pell grants' and supplemental educational opportunity grants (10% of institutional allocations may be used for less than half-time students who are otherwise eligible).	Individual applications to local institutions who have an agreement with the Secretary of Education.
	Special services to disadvantaged including basic education skills, counseling, tutorial services, exposure to career options; provision of education and financial aid information through educational opportunity centers, staff development.	Discretionary grants program. Contact Secretary of Education.
Student Loans	Guaranteed and insured student loans.	Contact local institutional financial aid officer.
Department of Education Library Services and Construction Act as amended – Title IV Older Reader Services	Conduct of special library programs for elderly; purchase of special materials; provision of in-home visits by librarians; outreach services; provision of transportation; employment of elderly; training of librarians to work with elderly.	Services covered by State Plan. Contact State education agency.
Department of Health and Human Services Administration on Aging Older Americans Act of 1965 as amended – Title III Part B Social Services	Provides funds for social services which may include continuing education; information and referral; personnel counseling; health education; consumer education; household management training; recreational arts and crafts; community education programs and services; legal services; home repair programs; pre-retirement and second careers counseling; operation of multipurpose senior centers.	Funding allocated by area agency on aging according to a local plan. Contact area agency on aging.
Department of Health and Human Services Administration on Aging Older Americans Act of 1965 as amended – Title III Part C Nutrition Services	Establishment and operation of projects providing for congregate and/or home delivery of meals including nutrition education and other supportive services.	Funding allocated by area agency on aging according to a local plan. Contact area agency on aging.

Administrative Agency Legislative Authority Program Name	Authorized Programmatic Uses	Application Procedures
Department of Health and Human Services Administration on Aging Older Americans Act of 1965 as amended - Title IV-A Training	Payment in whole or in part for short-term and in-service training courses, workshops, institutes and other personnel development activities; conduct of seminars, conferences, symposiums and workshops in field of aging; fellowships and stipends for postsecondary education and training courses preparing personnel for field of aging; preparation of curriculum materials; projects and activities designed to attract qualified persons to field of aging.	Discretionary grants program. Contact Commissioner of Aging *also* Activities may be covered by State Training Plan. Contact State agency on aging.
Department of Health and Human Services Administration on Aging Older Americans Act of 1965 as amended - Title IV-C Discretionary Projects and Programs	Projects that provide continuing education to older individuals to broaden their educational, cultural and social awareness; pre-retirement education; social services for physically and mentally impaired older individuals; for the unmet needs of special populations of older persons; for operations of senior ambulatory care day centers offering health, therapeutic, education, nutrition, recreational, rehabilitation and social services.	Discretionary grants program. Contact Commissioner of Aging.
Department of Labor Employment and Training Administration Older Americans Act of 1965 as amended - Title V Senior Community Service Employment Program	Provides funds for subsidized part-time community service for disadvantaged older persons as well as for transportation services and administrative costs.	Contact State employment agency designated to administer funds and national contractors.
Department of Labor Employment and Training Administration Comprehensive Employment and Training Act as amended - Title II Part B Sec. 215 Services for Older Workers	Programs to assist older workers in overcoming employment barriers; upgrading their skills, removing age stereotyping and developing appropriate job opportunities.	Contact nearest CETA prime sponsor or balance-of-state program operator.
Department of Labor Employment and Training Administration Comprehensive Employment and Training Act as amended - Title III Section 308 Special Projects for Middle-Aged and Older Workers	Payment of tuition and costs for second career programs to assess skill and work experience for purposes of formulating realistic second career objectives; provide second career and occupational upgrading counseling; assist in formulating second career objectives; and train for second career objectives.	Discretionary grants program. Contact Secretary of Labor.
Department of Labor Bureau of International Labor Affairs Trade Adjustment Assistance Act of 1974 Trade Adjustment Assistance for Workers	Provides reimbursement for training costs and other employment services provided workers who are totally or partially unemployed because of increased imports.	Contact nearest local Employment Security Office.
Community Services Administration Community Services Act of 1974 - Title II Part B Senior Opportunities and Services Program	Funding for information and referral, residential repair and renovation, outreach activities and operation of senior centers.	May be funded by local Community Action Agencies. Contact state economic opportunities office or local community action agency.

Administrative Agency Legislative Authority Program Name	Authorized Programmatic Uses	Application Procedures
ACTION Domestic Volunteer Services Act of 1973 Foster Grandparents, Senior Companions and Retired Senior Volunteers Programs	*Foster Grandparents* provides stipend for low-income older persons who provide volunteer supportive services to children with special needs. *Senior Companion* program provides stipend for senior volunteers who serve as senior companions for elderly in residential and non-residential group care facilities. *Retired Senior Volunteers* encourages the use of retired senior volunteers in a variety of community service activities.	Contact State ACTION office.
Department of Commerce Economic Development Administration Local Public Works Development and Investment Act – Title I Public Works	Funds for construction of and/or renovation and improvements of senior centers	Apply to local governments.
Department of Health and Human Services Office of Human Development Services Social Services Amendments of 1974 Public Social Services	Provides funding for social and employment services for eligible older persons. Services must be included in State Title XX Plan in order to be funded.	Contact local agency administering Title XX funds regarding possible contractual agreements for purchase of service.
Department of Commerce Small Business Administration Service Corps of Retired Executives	Provides access to a pool of senior volunteers with business experience.	Contact regional office of Small Business Administration.
Department of Health and Human Services Rehabilitative Services Administration Rehabilitation Act of 1972 PL93-112 Rehabilitation Services and Facilities Basic Support Vocational Rehabilitation Service for Social Security Disability Beneficiaries	Provides funding for provision of vocational training and supportive service to eligible older individuals.	Contact local vocational rehabilitation unit.

Grant monies can also be obtained from private foundations. Foundations with a stated interest in funding projects pertaining to older persons include:

NAME OF FOUNDATION:	PURPOSE:
Bissell (J. Walton) Foundation 29 Ten Avenue Lane West Hartford, Conn. 06107	*Interested in higher and secondary education: Care of the aged.*
duPont (Alfred I.) Foundation P. O. Box 1380 803 Florida National Bank Building Jacksonville, Florida 32201	*Charitable giving including care, treatment and development of elderly adults needing assistance in bodily betterment or advancement.*
Whitehead (Lettie Pate) Foundation, Inc. 1400 Peachtree Center Tower 230 Peachtree Street, NW Atlanta, GA 30303	*Institutional grants to assist poor aged Christian women in the nine southeastern states.*
The Retirement Research Foundation 405 Touhy Avenue Park Ridge, IL 60068	*To conduct and provide for research concerning problems of industry and of individuals arising from the retirement of workers from regular gainful employment and aging.*
Campbell (Bushrod H.) and Adah F. Hall Charity Fund c/o Palmer & Dodge One Beacon Street Boston, MA 02108	*Grants to organizations in New England to aid older people.*
Ford (Benson and Edith) Fund 100 Renaissance Center, 34th Fl. Detroit, MI 48243	*Broad purposes; grants for the aged.*
Kesge Foundation 2401 West Big Beaver Road Troy, NY 48084	*Grants generally to well established, financially sound, accredited institutions. Grants for care of the aged.*
The Whiting Foundation 901 Citizens Bank Building Flint, MI 48502	*To aid and improve the physical, financial, mental and moral condition of the poor, the sick, the young, the aged, and the disabled among all classes.*
Duke (The Doris) Foundation, Inc. Duke Farms Route 206 Somerville, NJ 08876	*Grants to charitable institutions with priority given to agencies in New York with occasional grants to New Jersey, North Carolina, South Carolina, Hawaii. Grants for improved services for the aging.*
Rippel (Fannie E.) Foundation 299 Madison Avenue Morristown, NJ 07960	*Grants to aid organizations for the relief and care of aged women.*
Burden (Florence V.) Foundation 630 Fifth Avenue New York, NY 10020	*Grants on problems of aging. Emphasis on practical approaches for solving problems, management improvement and policy research.*
Clark (The Edna McConnel) Foundation 250 Park Avenue, Room 900 New York, NY 10017	*Grants to enable the elderly to contribute to their communities and to generate income by developing opportunities for volunteer or paid jobs, by improving the capability of placement agencies to service older job applicants and by encouraging educational institutions to meet the job development and training requirements of older persons.*

NAME OF FOUNDATION:	PURPOSE:
Culpeper (Charles E.) Foundation, Inc. 866 United Nations Plaza, Room 408 New York, NY 10017	*Grants to organizations concerned with the aged.*
The Institute for Socioeconomic Studies, Inc. Airport Road White Plains, NY 10604	*Broad research interested including problems of the elderly. Conducts research, sponsors conferences, publishes books and papers.*
Killough (Walter H. D.) Trust c/o Marine Midland Bank 250 Park Avenue New York, NY 10017	*Grants to homes for the aged.*
McDonald (J. M.) Foundation, Inc. 2057 East River Road Cortland, NY 13045	*Grants for the aged.*
New York Foundation Four West 58th Street New York, NY 10019	*Giving primarly confined to the New York area for projects to improve the quality of life for disadvantaged, handicapped and minority population with extra emphasis on the elderly.*
Schimper (Frederick and Amelia) Foundation 299 Park Avenue New York, NY 10017	*To support welfare programs focused on the needs of indigent, aged persons.*
Rosenthal (The Samuel) Foundation c/o Leighton A. Rosenthal 1768 East 25th Street Cleveland, OH 44114	*Broad purposes. Grants to homes for the aged.*
Mann Kraft Foundation 1617 John F. Kennedy Boulevard Philadelphia, PA 19103	*General giving, support for the aging.*
The Hassenfeld Foundation 1027 New Port Avenue Pawtucket, RI 02861	*Grants for the aged.*
Kimberly-Clark Foundation, Inc. North Lake Street Neenah, WI 54956	*General giving with specific emphasis on communities in which the corporation resides. Grants for senior citizens' activities.*

Additional sources of financial resources exist which may supplement Federal and foundation funding. Sources used successfully include grants, donations and/or returns from:

- City and County governments
- Local business/commercial establishments
- Civic groups
- Churches
- Clubs
- Private citizens
- Senior Club membership dues
- United Community Services
- Project-generated income

Non-financial Resources

Non-financial resources represent an often untapped and frequently underutilized source. Non-financial refers to existing facilities, equipment, materials/supplies, and staff that could be utilized in the delivery of needed services. Frequently these resources reside in the community and are not under the jurisdiction of educational planners. In recognition of the locus of control, they are frequently referred to as community resources.

The following are illustrative of community resources and are offered to suggest the range of possibilities for exploration.

Facilities

Senior centers
Libraries, museums, art galleries
Community rooms in shopping malls, commercial organizations and housing projects
Lodge and labor halls
Church social halls
Local public and private schools and institutions (evening and week ends)
Community based organizations
Mental health centers
Community action agencies
Vacant public or private buildings and installations
Unused space in public and governmental agencies
Business and industry sites
Recreation rooms in congregate retirement homes and residential care facilities
Private homes

Equipment

The specific programmatic nature of equipment precludes a comprehensive suggestion list. Access to equipment may be secured by bringing the equipment to the program or bringing the program to the equipment. The former arrangement is most often accomplished by loan, lease, purchase, or outright donation. If equipment is used for training purposes, care must be exercised to insure that the identified equipment is operable and is not obsolete. The latter arrangement can be accomplished through the use of equipment on-site during idle periods.

Possible sources for equipment are:

Local business/commercial/industrial organizations
Laboratories and/or shops of public or private schools/institutions
Governmental agencies
Federal government installations
Governmental surplus
Research laboratories
Community service agencies
Apprenticeship training programs
Private citizens

Materials

As with equipment, the range of possible materials is extensive. Materials that are not consumed in use, such as curricular and instructional materials, may be secured through a loan arrangement. Suitable training and materials might be obtained by contacting:

Training directors of local business and industrial firms
State (local) government training agencies
State (local) apprenticeship councils
Local public and private schools/institutions
Local human service program operators
Prime sponsor
State and area agencies on aging
State educational agency curriculum consultant
State and local libraries
Local universities
Gerontological centers
National Center for Research in Vocational Education
Private research firms
National Council on the Aging
National Council of Senior Citizens
American Association of Retired Persons
American Association of Community and Junior Colleges — Older Americans Programs
Administration on Aging
Department of Education

Staff

Existing staff time may be augmented through an extended day arrangement. The feasibility of this arrangement depends upon staff interest and capabilities for dealing with an older clientele as well as contract restrictions for those staff covered by collective bargaining agreements. Expertise may be augmented by personnel from local business and industries and by private citizens functioning in a voluntary capacity. The use of older persons as volunteers is especially encouraged. Utilization of external personnel as program staff requires care to ensure that they are adequately trained and efficiently managed. See Chapter Eight for a more extended treatment of volunteer management.

A Strategy for Location of Community Resources

Location of community resources requires contact with the various community agencies, organizations and institutions that own or otherwise control resources. Like needs assessment, an assessment of the extent and availability of community resources may be handled through surveys or interviews with organizations or from reviews of existing data. State or area agencies on aging may be able to provide a listing of major programs or services within a specific geographic area. Similarily, CETA prime sponsors are required to develop an inventory of community service providers. Whereas existing resource inventories may not identify specific resources, they will at least assist in the identification of major resource providers.

COMMUNITY RESOURCES*

1. **ECONOMIC ORGANIZATIONS**
   - BUSINESS FIRMS
   - CORPORATIONS
   - CHAMBER OF COMMERCE
   - VOCATIONAL GROUPS
   - UNIONS
   - RETAIL MERCHANTS ASSOCIATION
   - FARMERS ASSOCIATION
   - BOARDS OF BANKS, CORPORATIONS
   - PROFESSIONAL ASSOCIATIONS
2. **GOVERNMENT ORGANIZATIONS**
   - FEDERAL DEPARTMENTS & AGENCIES (LOCAL OFFICES: GENERAL SERVICES ADMINISTRATION, EQUAL EMPLOYMENT OPPORTUNITY COMMISSION, DEPARTMENT OF HEALTH, AND HUMAN SERVICES, DEPARTMENT OF EDUCATION, ETC.)
   - STATE DEPARTMENTS AND AGENCIES (LOCAL OFFICES: BUREAU OF VOCATIONAL REHABILITATION, HEALTH DEPARTMENT, WELFARE DEPARTMENT, EMPLOYMENT SECURITY)
   - COUNTY DEPARTMENTS AND AGENCIES (LOCAL OFFICES: COUNCIL ON AGING, COOPERATIVE EXTENSION, WELFARE DEPARTMENT, PLANNING, TRANSPORTATION)
   - COMMUNITY DEPARTMENTS AND AGENCIES (RECREATION DEPARTMENT, WELFARE DEPARTMENT, HEALTH DEPARTMENT, HOUSING DIVISION, BOARD OF EDUCATION, ETC.)
   - COUNCIL OF GOVERNMENT
   - AREA AGENCY ON AGING
   - CETA PRIME SPONSOR
3. **EDUCATION ORGANIZATIONS**
   - BETTER SCHOOLS GROUPS
   - PARENT TEACHER ORGANIZATIONS
   - ADULT EDUCATION GROUPS
   - PROFESSIONAL ASSOCIATIONS
4. **RELIGIOUS ORGANIZATIONS**
   - CHURCHES AND SYNAGOGUES
   - GROUPS ASSOCIATED WITH CHURCHES AND SYNAGOGUES
   - ECUMENICAL ORGANIZATIONS, COMMISSIONS
   - CLERGY ASSOCIATIONS
   - LAYMEN ASSOCIATIONS
   - PRIMARILY RELIGIOUS (BIBLE STUDY GROUPS, WORSHIP GROUPS)
   - OTHER (CLUBS, TEAMS, SOCIAL GROUPS)
5. **CULTURAL, FRATERNAL AND RECREATIONAL ORGANIZATIONS**
   - CONCERT SOCIETIES
   - STUDY AND FORUM GROUPS
   - ART SOCIETIES
   - DRAMATIC GROUPS
   - LITERARY SOCIETIES
   - NATIONALITY GROUP FRATERNAL ASSOCIATIONS
   - OCCUPATION-ORIENTED FRATERNAL ASSOCIATIONS (POLICE LEAGUES)
   - OTHER FRATERNITIES, LODGES, GRANGES, SECRET SOCIETIES
   - ATHLETIC TEAMS
   - ATHLETIC CLUBS
   - HOBBY CLUBS
   - SOCIAL ENJOYMENT GROUPS
   - GROUPS SERVING ONE PARTICULAR MINORITY
6. **CIVIC ORGANIZATIONS**
   - SENIOR CLUBS
   - SERVICE CLUBS
   - GOOD GOVERNMENT LEAGUES
   - PATRIOTIC AND VETERANS ASSOCIATIONS
   - TAXPAYERS ASSOCIATIONS
   - POLITICAL PARTY ORGANIZATIONS
   - NEIGHBORHOOD PLANNING ASSOCIATIONS
   - REAL ESTATE ASSOCIATIONS
   - HOUSING ASSOCIATIONS
7. **HEALTH AND WELFARE ORGANIZATIONS**
   - CHARITABLE ORGANIZATIONS
   - RELIGIOUS CHARITABLE ORGANIZATIONS
   - BOARDS OF SOCIAL AGENCIES
   - WELFARE OR HUMANE ASSOCIATIONS
   - CHILD WELFARE ORGANIZATIONS
   - YOUTH ORGANIZATIONS
   - FEDERATIONS OF PROFESSIONAL WORKERS
   - ORGANIZATIONS OF PARTICULAR DISEASES (HEART, CANCER, ARTHRITIS)
   - GENERAL COMMUNITY HEALTH GROUPS
   - SAFETY COUNCIL
8. **COMMUNITY AND PLANNING ORGANIZATIONS**
   - UNITED COMMUNITY SERVICE ORGANIZATIONS
   - CHESTS, UNITED FUNDS, COUNCILS
   - COMMUNITY ACTION AGENCIES (POVERTY)
   - COMMUNITY PLANNING ASSOCIATIONS
   - COORDINATING COMMITTEES
   - FEDERATIONS OF CLUBS
   - OTHER INTERGROUP AGENCIES OR ORGANIZATIONS

*Adapted from National Council on the Aging Community Organizations.

Once resource providers have been identified they should be surveyed to determine extent and types of resources available. Resource providers should be individually contacted, preferably in person. The purpose of the survey should be explained and the planned goal(s), objectives and selected service strategies for provision of services to older persons described. Respondents should be asked: 1) to indicate their interest in cooperating, and 2) to describe the resources they would be willing and/or able to contribute. Resources should be described according to descriptive categories.

RESOURCE DESCRIPTORS

Facilities

Physical description (building, room, laboratory, classroom, etc.)
Seating capacity
Special accommodations
Accessibility
Availability schedule

Equipment

Description (type, condition, age)
Basis of availability (loan, donation, rent, purchase)

Instructional Materials

Description (type, content, ancillary resources required)
Basis of availability (loan, donation, rent, purchase)

Staff

Name and address
Skills and experience
Availability

Survey results should be recorded on worksheets. It is recommended that a worksheet be kept for each organization contacted. Each worksheet should: 1) identify the resource provider by organization's name and address; 2) identify the organizational representative contacted; 3) provide for description of specific resources by kind (e.g. facility, equipment, etc.).

The worksheets can then serve as a handy cross-reference. For each resource kind, the resource providers having such resources can easily be identified. In this manner, an indexed inventory of available community resources can be readily constructed.

Resource Acquisition

Identification of financial resources does not insure their acquisition. In order to secure funding, funding sources must be selected and a proposal for funding submitted. Selection of funding sources depends upon a number of factors including knowledge of projects previously funded by the funding agency, funding agency priorities, previous success with funding source and informal signals that the funding source would welcome a proposal.

Specific proposal requirements vary according to the funding agency. However, some general requirements can be described.

TYPICAL PROPOSAL REQUIREMENTS

- Abstract of the proposed project
- Statement of need and the problem to be addressed
- Specification of the procedures for the accomplishment of each objective
- Management plan for the allocation of resources to achieve the desired objectives
- Description of the proposed results or end products to be accomplished
- Evaluation plan (to the extent appropriate)
- Plan for the dissemination of products (to the extent appropriate)
- Staff capabilities and experience
- Institutional or organizational commitment to provide adequate facilities and equipment
- Itemized budget
- Assurances of compliance with State and Federal rules and regulations

Project approval criteria represent the standards for judging quality and compliance considerations of proposals received from eligible recipients. Quality and compliance are frequently evaluated in the following areas:

- technical approach;
- management plan;
- evaluation plan (if appropriate);
- dissemination plan (if appropriate);
- staff allocation;
- institutional commitment;
- budgetary considerations; and
- assurances.

The technical approach should focus on the extent to which there is a clear definition of the need for the proposed project and a succinct delineation of the problems to be addressed. The objectives of the proposed project should be sharply defined, clearly stated, capable of being attained through the use of the proposed procedures and capable of being measured. Procedures for the attainment of the objectives should be clearly stated and should specify how each objective will be attained. The management plan should show the time lines for each of the major project activities, the interrelations between project activities, and should provide a detailed specification of project results. Staff allocation should address eligible recipients' willingness to assign staff adequate both in number and experience to achieve the proposed objectives. Institutional commitment should provide reasonable evidence of the applicant's commitment to the project in terms of willingness to provide the necessary supportive equipment and facilities as well as their willingness to provide documented evidence that the necessary support from cooperating institutions and agencies has been obtained. Budgetary considerations should evidence reasonableness of the cost estimates considering the size, scope and duration of the proposed project. Judgments as to the evaluation proposed should focus on the suitability of the evaluation criteria and the evaluation methodologies proposed as a means of determining whether project objectives have been achieved. The dissemination efforts should be described including proposed activities to communicate project results to the intended target audiences.

Acquisition of non-financial resources depends upon the development of cooperative and coordinative linkages between vocational education and community resource providers. This subject is discussed in the next chapter.

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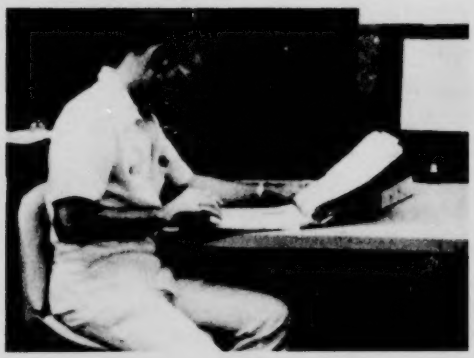

3. COORDINATION OF SERVICE DELIVERY

Effective and efficient provision of education and training to older persons necessitates a coordinative approach. Inclusion of all agencies with a service commitment to older persons assures that a broad range of services is provided so as to maximize the collective impact of limited resources. By pooling effort, the potential service and delivery alternatives for the development of mature human resources are materially increased.

COORDINATION

- Minimizes duplication of effort;
- Maximizes available resources;
- Strengthens available services; and
- Assures that older persons receive a full range of programmatic and support services.

Coordination involves four procedural steps.

STEP 1
Identification of agencies which are concerned with provision of services to older persons.

STEP 2
Determine incentives and barriers to development of coordinative relationships.

STEP 3
Develop coordinative arrangements.

STEP 4
Implement cooperative working relationships.

STEP 1. AGENCY IDENTIFICATION

The first step in coordination is to identify the relevant agencies involved in the provision of services to older persons. The agencies most directly concerned with educational and employment opportunities are:

- State/local vocational education agencies/institutions;
- State/local adult education agencies/institutions;
- State/area agencies on aging; and
- CETA prime sponsors.

Vocational Education

Enabling Legislation

The Smith-Hughes Act of 1917 provided financial assistance to the states for the payment of salaries of teachers, supervisors and directors of agriculture, trade, home economics and industrial subjects. Though historically significant as the marking of the beginning of vocational education as a national program, the

principal directive force was the Vocational Education Act of 1963. This Act radically expanded the scope of vocational education and established its role and responsibility in serving the needs of special populations. Subsequent Amendments in 1968 and in 1976 sharpened and extended but did not alter the original thrust of the Act.

Mandated Purposes

The fundamental purpose of vocational education is preparation for work. As society came to the recognition that lack of employability skills was a major deterrent to equality of economic opportunity, it turned to vocational education as a means of remediation. As a result, vocational education was legislatively assigned responsibility for the development of the underprivileged so as to overcome the debilitating effects of economic discrimination.

Organizational Structure

Vocational education is a Federal, state and local partnership. At the Federal level, the Department of Education, Office of Vocational and Adult Education, has responsibility for administrating the provisions of the Vocational Education Act and the Adult Education Act. States have constitutional responsibility for the provision of education. Control over education is shared jointly by the executive and legislative branches of state government. Executive jurisdiction for secondary education is centered in a state board of education. Postsecondary education may be under the jurisdiction of a community college board or, alternatively, a board of higher education. Responsibility for delivery of education is delegated to a local school district in the case of secondary education or to a local institution for postsecondary education.

Delivery of adult vocational programs and services at the local level takes a variety of forms. Adults may be served in comprehensive high schools, specialized vocational-technical high schools, area vocational technical schools, technical institutes and/or community colleges. They may take but a single vocational course or be enrolled in a one-year vocational certificate program or a two-year associate degree program. Courses may be offered during regular school hours (day program), in the late afternoon (extended-day program) or in the evening (evening program). In general, extended-day and evening programs tend to be attended primarily by adults. Instructors of these programs often are employed in local business and industry and teach in a part-time capacity.

Adult Education

Enabling Legislation

Federal support for the education of adults is authorized by two major Federal acts, the Adult Education Act and Title I-Community Service and Continuing Education Programs of the Higher Education Act of 1965. The amended Adult Education Act appears as Title XIII-Part A of the Education Amendments of 1978. The Higher Education Act has been subsequently amended by the Education Amendments of 1980.

Mandated Purpose

Adult education is oriented to raising the literacy level of adults and to providing training to enable them to 'become more employable, productive and responsible citizens.' A special authorization is provided in the Adult Education Act for special projects for the elderly. Title I funds of the Hughes Education Act may be used for the purpose of promoting retention of adults in continuing education, developing their occupational potential, elimination of barriers which may prevent enrollment and provision of occupational guidance, counseling and other services designed to promote re-entry into postsecondary education and the labor force.

Organizational Structure

As with vocational education, adult education is also a Federal, state and local endeavor. At the Federal level, adult education is administered by the Department of Education with the Office of Vocational and Adult Education having responsibility for programs funded under the Adult Education Act. At the state level, adult education may be under the administrative jurisdiction of a board of education, a community college board or a board of higher education. Title I activities may be administratively located in state education agencies or alternatively in other departments such as community affairs or consumer affairs. Adult education at the local level may be offered by comprehensive high schools, technical institutes, two-year community colleges, four-year colleges and universities, public and private vocational and business schools and private non-profit agencies. The majority of adult education courses are non-credit, with many adults reportedly participating for job or career-related reasons.

Administration on Aging

Enabling Legislation

The Older Americans Act of 1965 as Amended constitutes the basic authority for Federal support of programs for the aging. The Act provides authorization for grants for states and community programs on aging (Title III); training, research and discretionary projects and programs (Title IV); and community service employment for older adults (Title V).

Mandated Purpose

The intent is to allow older people full and free opportunity for the participation in and enjoyment of a range of economic, social and cultural entitlements. As related to employment and training, the Act provides for opportunity for employment without age discrimination, removal of barriers to economic and personal independence, pre-retirement and second career counseling services and authorization of a program to provide part-time employment for older disadvantaged.

Organizational Structure

The Act created an Administration on Aging at the Federal level. The functions of the Administration among others are to administer grants provided by the Act, to coordinate Federal programs and activities relating to the purposes of the Act, to sponsor development of a comprehensive and coordinated service network for older persons, to provide technical assistance and to support research and development efforts in the field of aging.

Administration at the state level is the responsibility of a state unit on aging, which may be attached to the office of the governor, housed in departments of human services or other alternative arrangements. These state units function to administer the state programs on aging according to a state plan, to coordinate statewide activities related to the purposes of the Act, to serve as an advocate for the elderly and to allocate resources to designated area agencies on the aging.

Area agencies are to represent designated sub-state planning and service areas. These areas may be any unit or combination of units of local government having a population of 100,000 or more. Area agencies may be an established office of aging, an office or agency designated by the chief elected official of an eligible governmental unit or combination of officials representing several units or any public or private agency which is under the direction of the state unit on aging. Area agencies on aging are responsible for the preparation of an area plan for provision of comprehensive and coordinated services to the aging and for the provision of necessary administrative and monitoring services to assure that services are being provided on the basis of demonstrated need. Services to the aging are generally provided under contract with local service providers.

Prime Sponsors

Enabling Legislation

The authority for Federal employment and training efforts is provided by the Comprehensive Employment and Training Act (CETA) as amended.

Mandated Purpose

The Comprehensive Employment and Training Act had two strategic objectives—that of decentralization and decategorization of Federal manpower programs and the provision to local communities of the flexibility to plan and deliver manpower services suited to their localities. Responsibility for the planning and administration of manpower programs is assigned to local units of government designated as prime sponsors. Restrictions on the use of funds has been ostensibly removed with prime sponsors given the freedom to design the basic mix of program services and delivery mechanisms best suited to their purposes.

Organizational Structure

Federal oversight is provided by the Department of Labor. A key component of the Federal role is to ensure compliance with the legislation. This role is carried out through the issuance of regulations and guides establishing mechanisms for hearings and appeals and the provision of technical assistance. Responsibility for interpretation and application of regulations to specific prime sponsors is assigned to the Department of Labor regional offices.

The role of the state in the delivery of employment and training services is limited principally to serving as a sponsor for the balance-of-state. The balance-of-state, being comprised of sparsely populated counties and/or units of government that could otherwise qualify but chose not to, is generally divided into sub-units consisting of counties or some organizations of local government. CETA funds and operational control are then delegated to these local units.

A prime sponsor is offically described as a State or a unit of local government with a population in excess of 100,000, any consortium of units of local government or any unit of local government or any consortium designated by the Secretary. In a unit of local government, the mayor or city manager is designated the chief administrative officer. The office of the prime sponsor consists of the chief administrative officer and a supporting staff. The executive director or administrator is responsible for the functions of financial management, management information systems, contracts and grants administration, independent monitoring, planning and program operations. Prime sponsors have freedom in the selection of program service deliverers. This discretionary choice has placed prime sponsors in a unilateral position to select their service deliverers according to their delivery expectations and demands.

STEP 2. DETERMINATION OF INCENTIVES/BARRIERS TO COORDINATION

Once agencies are identified, the next step is to determine how they might coordinate their service mandates and activities. An analysis of the incentives facilitating coordination as well as those barriers and constraints restricting coordination can aid in this determination. A logical starting point is Federal legislation.

Mandated Coordination

Vocational Education

The purpose of Federal assistance to vocational education is ". . . to assist States in improving planning in the use of all resources available to them for vocational education and manpower training . . ." [Sec. 101 P.L. 94-482]. Five-year state plans for vocational education are to contain criteria guiding joint coordination of vocational education and manpower training programs conducted by prime sponsors. [Sec. 107 (b)(5)]. Annual plan and accountability reports are to show the results of said coordination [Sec. 108 (b)(1)(c)(i)]. Eligible local applicants are to describe in their annual applications how they will go about effecting coordination with local prime sponsors [Sec. 106 (a)(4)(c)] and with other community programs supported by state and local funds [Sec. 106 (a)(4)(D)].

Adult Education

State plans for adult education are required to describe procedures used for consultation, cooperation and coordination with various agencies. These agencies include the state education agency, state manpower service council, state occupational information system, as well as other agencies, organizations and institutions that operate employment and training programs [Sec. 306 (d)(3) P.L. 95-561]. Planning for adult continuing education is to be coordinated with planning as required under the Vocational Education Act, the Adult Education Act, the Comprehensive Employment and Training Act, the Older Americans Act of 1965 as well as with other Federal, state and local activities designed to provide outreach, guidance, counseling and educational, financial and occupational information [Sec. 113 (d) P.L. 96-374].

Agencies on Aging

The state agency on aging is primarily responsible for the coordination of all state activities related to the purposes of the Older Americans Act [Sec. 305 (a)(c) P.L. 95-478]. Area agencies on aging are encouraged where possible to enter into agreements with local education agencies, institutions of higher education and private non-profit organizations and agencies for services and activities as provided under the Elementary and Secondary Education Act [Sec. 306 (a)(6)(F)].

Prime Sponsors

The purpose of CETA as stated is to allow for maximum coordination of employment and training services funded under the Act with economic development, community development and other related activities including vocational education, public assistance, self-employment training and social service programs. [Sec. 2 P.L. 95-524]. Prime sponsor plans are to include provisions for coordination of services with senior centers, area agencies on aging and state agencies on aging [Sec. 215 (b)].

Planning

All of the aforementioned agencies are required to submit separate plans describing the intended services, the assurances as to compliance and the arrangements governing the proposed allocation of resources. Area

agencies, local vocational education agencies and institutions, and local adult education agencies and institutions each submit local plans to their counterpart state level agencies. These plans form the basis for preparation of state plans describing statewide activities. Prime sponsors, in contrast, submit their plans directly to the Department of Labor regional offices.

Coordination is intended to be an integral part of the planning process. Vocational education plans are to define the criteria and detail the linkages with employment and training programs. Adult education plans are to describe the means whereby public and private community service organizations are involved in the development and implementation of the plan. Area agency on aging plans are to provide for a 'comprehensive and coordinated' approach for delivery of services and to designate, where feasible, a focal point for the encouragement of maximum coordination. Prime sponsors' plans are to provide detailed descriptions of methods and arrangements used to involve community service deliverers and to insure their on-going participation in the conduct of employment and training services.

Governance

The administrative structure of the agencies provides a context that can facilitate or impede coordination. Vocational and adult education are divisions of the state education function. If both are under the jurisdiction of the same board, then common philosophies, values and policies guide both agencies with facilitative effects for coordination. If separate boards are involved, then opportunities for competition and conflict abound with less likelihood of agency cross-communication and articulation of programmatic effort.

Location of state units on aging impacts on the nature of coordination. Placement in state human service departments creates an inherent identification with health and welfare as the major service modalities. Since education has not traditionally identified these service areas as legitimate educational concerns and since education and human service agencies are often under separate departmental control, opportunities for coordination and linkages are restricted. In contrast, attachment to the office of the governor implies political priority to aging and a commitment that can be used to transcend agency boundaries and service prerogatives.

No comparable state agency exists for administration of statewide employment and training programs. The state in its capacity as the balance-of-state prime sponsor has administrative responsibility over only those programs in areas not served by other prime sponsors. Each state has an employment and training council with mandatory responsibility for reviewing prime sponsor plans and making recommendations for the development of an integrated and coordinated approach to the delivery of manpower services. However, their actions are advisory and depend upon gubernatorial support for implementation.

Differences in local governance also mediate coordination. The fact that vocational and adult education are under the administrative jurisdiction of local boards of education or institutional boards as the case may be, whereas area agencies on aging are under local government control, has significance for formation of coordination linkages. Local boards are often elected and frequently have separate taxation powers. As a result, they are insulated from direct influence by local government officials, thereby making communication more indirect and coordination more difficult.

Geographical Considerations

Variability in service area definitions may serve to hinder coordination. Whereas area agencies on aging may plan for a service area encompassing a multi-county area, local vocational education plans may encompass only a single school district within a county. Alternatively, postsecondary institutions may have a service area that overlaps several aging planning and service areas. A similiar situation may hold for prime sponsor service areas.

Lack of Knowledge

Barriers to coordination can result from a mutual lack of knowledge concerning the structure, roles and responsibilities of agencies that can play a major role in provision of services to an aging population. The concerns, problems and organizational constraints of each agency need to be understood in order to determine how best to effect agency coordination.

A working knowledge of each agency can be achieved through an active process of inter-agency communication.

Steps in communication include:

1. Obtain the name, address and telephone number of a contact person for each agency. The planning staff of each agency represents a good starting point for identification of a contact.
2. Set up a get acquainted meeting to discuss the general purposes, mandates and goals of each agency as they relate to provision of services to older persons.
3. Discuss current programs and projects as well as planned future activities to determine areas of common concern and to identify potential areas of coordination.
4. Explore the structure and administrative operations of each agency to identify possible facilitators and barriers to coordination.
5. Make definite plans for a future meeting including a clear understanding of the purpose of the next meeting and the agenda items to be considered.

STEP 3. SELECTION OF COORDINATIVE ARRANGEMENTS

The extent of mutual involvement desired will undoubtedly vary according to the compatibility of agency goals and the willingness to pool resources for the attainment of these goals. There are at least two levels of coordinative arrangements, each with progressively greater inter-agency involvement.

Types of Coodinative Arrangements
Contract
Inter-agency Agreement

Contract

In a contractual arrangement, the contract is the primary coordinative mechanism linking the agencies. It signifies a formal relationship with limited inter-agent contact in the planning and delivery of services. One agency simply purchases the expertise of another agency to provide a certain service for its clients. In some instances, the operational structure of an agency will specify contracting as a mechanism for coordination. For example, state and area agencies on aging generally enter into contractual agreement with local service providers. They provide services only where no other agency is willing or able to do so. In some parts of the country, state agencies on aging have made grants to community colleges to include on-campus classes for older persons as well as off-campus classes in senior centers, nursing homes, and housing for the elderly.[1]

Inter-agency Agreement

Inter-agency agreements stipulate the reciprocal service roles and responsibilities of the agencies that are parties to the agreement. Agreements should make explicit the inter-agency expectations concerning:

- the services to be provided;
- the period for which the services are to be provided;
- agency rights and responsibilities;
- the program standards against which performance will be monitored;
- the resources to be committed to the provision of service; and
- support to be provided by other agencies.

Inter-agency agreements differ from contracts in an important way. Whereas in contracts, funds are the essential consideration received from the contracting agency, this is not the case with inter-agency agreements. In this mode, agencies agree to pool resources in a collective endeavor with each agency sharing in the provision of needed services.

STEP 4. SHARED WORKING RELATIONSHIPS

Joint activities indicate the highest level of involvement. In this arrangement, agencies have agreed to participate together in shared functions. The following approaches suggest a variety of mechanisms for joint activity.

Suggested Mechanisms for Joint Activity

- **Planning of vocational and adult programs is coordinated to ensure the most efficient and effective utilization of resources to meet the needs of older Americans.**

  Options

  - There is a joint review and comment on vocational education, adult education and area agency on aging plans.
  - Joint meetings are held between vocational education and area agency planning staff.
  - Vocational education and area agency share planning staff.
  - Vocational education and area agencies on aging share information on existing programs, facilities and resources.
  - Vocational education and area agency planners share information on needs of older persons, demographic characteristics of older adults and employment opportunities.
  - There is shared membership on local advisory councils for vocational education and advisory councils for area agencies on aging.

- **Evaluation of vocational education and area agencies on aging programs are coordinated to ensure an integrated approach to meeting the education and employment needs of older individuals.**

  Options

  - There is joint agreement on the evaluation design including criteria for evaluation, evaluation procedures, instrumentation and methodology.
  - Vocational education and area agency on aging staff participate in monitoring and assessing impact of employment and training programs for older adults.
  - Vocational education and agency on aging staff participate in preparation of evaluation reports.
  - Vocational education follow-up procedures are used to track post-program achievements of employment and training programs.
  - Local advisory councils on vocational education and area agency councils collaborate in evaluation efforts.
  - Evaluation reports are jointly reviewed for purposes of program improvement.

- **Vocational education program improvement efforts are responsive to special needs of older adults.**

  Options

  - In-service education is provided to vocational instructors, counselors, and administrators to increase their awareness of the problems of older adults.
  - Curriculum, guidance and testing materials are developed or modified to meet older persons' needs.
  - Research and development efforts are used to test the effectiveness of a range of innovative approaches to serving older persons.
  - Programmatic reviews are conducted to determine suitability of vocational programs, services and activities for meeting needs of older persons.
  - Area agency on aging staff participate in program improvement efforts.

- **Technical assistance is provided to facilitate coordination of vocational education and area agency on aging activities.**

  Options

  - Teams composed of vocational educators and area agency staff jointly assess employment and training problems and make recommendations.
  - Area agency staff provide in-service training and technical assistance to vocational education professionals regarding legislation, regulations, requirements and funding.
  - Formalized agreements exist for sharing information between vocational education and area agency on aging.

- **A state level ad hoc committee on employment and training of adults should be formed.**

  Options

  - This committee should consist of a representative from the state agency having responsibility for vocational education programs; a representative from the state agency having responsibility for adult continuing education, a representative of the state employment and training council and a representative from the state unit on aging.
  - This committee should have responsibility for assessing the extent to which state supported education and training programs represent an integrated, consistent and coordinated approach to meeting the employability needs of older adults.
  - This committee should prepare a report recommending a coordinated, comprehensive and systematic approach for utilizing the resources of older persons.

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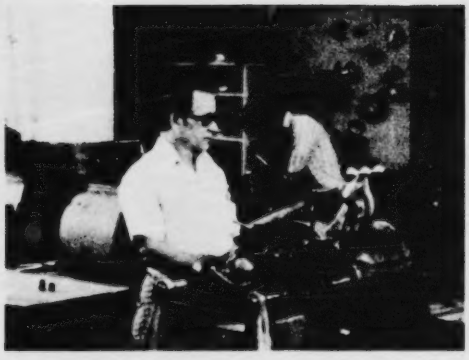

4. OUTREACH AND RECRUITMENT

IMPORTANCE

Outreach activities are essential in order to find those older persons who may potentially benefit from vocational education. Without active outreach, many members of the community will not be aware of the services provided by vocational education. This is particularly true for older persons, since they are less likely to obtain word-of-mouth information from peers and associates regarding the potential benefit from participating in a vocational education program.

Recruitment and outreach go hand in hand. Whereas outreach focuses on the location and initial communication with potential candidates, recruitment actively seeks to persuade them to enroll in a vocational program. In some instances, outreach and recruitment may be performed as an integral function. In fact, most postsecondary institutions have some sort of promotional activities used to recruit new students. These often include radio and television announcements, newspaper advertisements, direct mailings of flyers, and promotional displays in public places.

An institution wanting to do outreach to older persons should review the recruitment activities currently being used to see if the approaches, as well as the materials utilized, are designed to reach or stimulate the interest of older persons. Outreach and recruitment activities should be reviewed against the following criteria:

REVIEW CRITERIA

- Do recruitment activities include the dissemination of information to retirement communities, senior citizens service organizations or senior citizens centers in the area?
- Have the promotional materials ever included a picture of an older person in the role of a student or made reference to the fact that vocational education is for persons of *all* ages?
- Is the idea of a second career for retirees or soon-to-be retirees ever mentioned in promotional materials?
- Have success stories of older persons who have completed vocational education been used as promotional material?
- Have any attempts been made to personally contact older persons and to convey to them the benefits of vocational education?

DEVELOPING AN EFFECTIVE OUTREACH PROGRAM

Four steps are involved in developing an effective outreach program:

STEP 1

Identify the target group of older persons

STEP 2

Determine the best methods to reach the target groups

STEP 3

Develop the message(s) to appeal to the target group

STEP 4

Decide when and for how long to emphasize outreach activities

STEP 1. IDENTIFYING THE TARGET GROUPS

Identifying groups of older persons for outreach efforts will have been accomplished during the planning activities described in Chapter Two. The needs assessment data and the goals and objectives for serving older persons will provide direction as to which groups of older persons are to be given priority consideration during outreach activities. Based on that information, program personnel will need to clarify which segments of the population of older persons should be the focus of outreach and recruitment efforts. For example, it could be that the targeted groups are older persons who:

- have recently lost their jobs due to the closing of a major industrial plant;
- are currently retired and would like to operate a part-time business out of their homes;
- are solely dependent upon social security and wish to augment their incomes;
- will soon be eligible for retirement benefits and would like to start a new career.

STEP 2. SELECTING OUTREACH/RECRUITMENT METHODS

After deciding on the groups for targeting outreach and recruitment efforts, the best possible methods for reaching those groups should be identified. Specific methods for reaching these groups can be chosen by weighing available resources and anticipated effectiveness. A brainstorming session is a useful means for generating a number of possible strategies for reaching the older persons. This approach emphasizes the quantity of ideas produced rather than the quality. Participants are encouraged to express their ideas freely in response to a specific problem. All of the ideas are then reviewed to identify their strengths and limitations.

To illustrate the application, a hypothetical problem involving the recruitment of older persons is presented below, followed by sample ideas for solving the problem.

Problem: *How to recruit older persons who are retired and would like to learn how to operate a business out of their home*

Possible Outreach/Recruitment Strategies

- News broadcasts
- Television or radio public service announcements
- Participating in a local radio or T. V. talk show
- Showing of an advocacy film on local T.V. and to community groups
- Direct mailing to retirees
- Direct telephone contact with retirees
- Presentations to senior citizen groups
- Posting announcements in shopping centers and senior citizen centers
- Including announcements in senior citizen news-letters
- Mobile recruitment van
- Setting up information booths in shopping centers and malls
- Conducting a door-to-door campaign in areas with high concentrations of older persons
- Soliciting referrals from community service agencies

Alternative strategies so generated should then be compared on the following considerations:

- resource requirements;
- potential for reaching the targeted group(s);
- external constraints; and
- auxiliary benefits.

A comparison of some of the ideas listed above might look like this:

IDEA: *News Broadcasts*

Resource Requirements: *Minimal, preparation of news story.*
Potential for Reaching Target Group: *Depends upon target group listening to news; little control over this.*
External Constraints: *Cooperation of news department; availability of news time for broadcast.*
Auxiliary benefits: *Will reach a wide audience in addition to the target group; could stimulate other enrollments.*

IDEA: *Presentations to Senior Citizen Groups*

Resource Requirements: *Person(s) to travel to give presentations.*
Potential for Reaching Target Group: *Highly targeted to older persons reaching only those involved in senior citizen groups.*
External Constraints: *Depends upon scheduling of senior citizen group activities. Requires advance planning.*
Auxiliary benefits: *Allows for two-way sharing of information.*

IDEA: *Informational booths in shopping centers and malls*

Resource Requirements: *Production of handout materials. Persons to operate booth and distribute information.*
Potential for Reaching Target Group: *Good possibilities if centers/malls are selected in areas with high concentrations of older persons.*
External Constraints: *Permission from management of shopping centers/mall. Could conflict with other scheduled show/exhibits.*
Auxiliary benefits: *Provides for two-way sharing of information. Reaches a large audience of potential students both young and old.*

Based on a review of the strengths and limitations of the various alternatives, the outreach/recruitment method(s) should be selected which are best suited to institutions/school needs and resources. When multiple recruitment methods are selected, consideration must be given to balancing those methods so as to avoid unnecessary duplication.

STEP 3. DEVELOPING THE MESSAGE

When developing the message, the needs and interests of the target group(s) are the first consideration. What can the vocational program offer that would motivate the targeted group(s) to participate in the program? Is it

- an opportunity to learn new skills?
- the ability to be self-employed?
- individualized instruction?
- self-paced instruction?
- off-campus courses?
- employment counseling?
- reduced tuition?
- specially designed courses?
- free transportation or car pool arrangements to/from courses?
- discounts on books and course fees?
- waiver of enrollment prerequisites?
- free parking?
- career exploration activities?

The message will need to be tailored to the possibilities and constraints inherent in the recruitment method. For example, recruitment methods which allow for a one-way flow of information, such as posters, news announcements, and direct mailings, should include specific information on how the reader or listener can obtain additional information.

When the method allows for two-way communication, such as presentations to groups of older persons, booths in shopping centers or malls, and door-to-door recruitment, the institutional/school representative must be prepared to answer a wide variety of questions regarding the institution and the vocational education program. In this latter case, the representative should encourage interested persons to leave their names and addresses so that additional information can be sent. Handouts should be available so that interested persons can take something from their first encounter to consider and to use as a reference in contacting the appropriate person or office.

When using a brief television or radio announcement, a rule of thumb is to plan approximately two words for each second of air time. Thus a thirty second announcement allows for a message of approximately sixty words. A sample thirty second announcement might read as follows:

SAMPLE ANNOUNCEMENT

"Have you recently retired or are you about to retire? Are you interested in pursuing a new career on either a full or part-time basis? If you are, Central Vocational Technical Institute has a variety of programs and services for older adults wishing to enter new careers. Day and evening courses are available. There are no tuition charges for persons over 55 years old. For further information contact the Second Careers office at 555-4631. That number again is 555-4631."

Printed promotional materials such as posters, brochures, displays and exhibits should include pictures of older persons, both men and women, participating in the vocational education program. Such pictures help dispel the stereotype that vocational education is for younger people and convey the message that older persons enjoy their involvement in the vocational program.

STEP 4. TIMING OUTREACH ACTIVITIES

The timing of outreach activities should be planned so that they are in accord with the institution's registration and admissions practices. When the institution allows admission to programs at certain times of the year, outreach activities should be emphasized in the months immediately prior to registration. However, if the institution allows admission to programs at many times during the year, then outreach can be a continuing activity.

Older persons need sufficient time to plan their other activities so that their schedules will be compatible with the school schedule. They may need to adjust their work schedule or family responsibilities so that they can attend classes. They may need to change their vacation plans so that they will be in town when classes start. They might have other obligations to fulfill prior to taking on the responsibilities associated with participating in the vocational education program. The implication is that outreach activities for older persons stretch over a longer period of time than would be the case for recruitment of younger students.

Many outreach activities require the cooperation of groups or organizations outside the educational system, such as newspapers, television stations, and senior citizen groups. The planning of outreach activities must allow enough lead time for external groups to be responsive to the school's requests. As soon as the recruitment methods have been identified, school personnel should contact these outside agencies in order to determine how much lead time they will need. Advance notice of several weeks or more is needed for the following:

- announcements in newsletters
- feature newspaper articles
- feature television news stories
- talk show appearances
- presentations to senior citizens groups
- promotional booths in shopping malls

It is worth noting that scheduling represents a major barrier to servicing special needs populations. If vocational education is to meet the needs of older persons, every effort should be made to schedule vocational education offerings so as to result in maximum convenience of those to be served.

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Materials which may be helpful when planning outreach activities

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Glicksman, Lillian L. and others *Program Planning Guide for Education to the Elderly*. Final Report. Boston, MA: Massachusetts Association of Older Americans, April 25, 1975.

5. SUPPORTIVE SERVICES

Services not directly related to outreach/recruitment, instruction or employment are considered to be supportive in nature and are known as supportive services. These services reflect an acceptance of the wholeness of an individual and the necessity to minister to a broad range of human needs.

The nature of the supportive services to be offered depends upon the special population being served. Older persons, because of the aging process and their assigned societal and cultural roles, have needs for a variety of specialized supportive services.

Supportive Servics for Older Populations

Supportive Services	Rationale
1. Individual assessment	1. Differential effects of aging and unique individual needs require knowledge of capabilities, abilities, skills, interests and values as the basis for an individualized service approach.
2. Personal counseling/guidance	2. Need to overcome fears and self-imposed limitations inhibiting the expectations and potentialities of older persons.
3. Information and referral	3. Provision of centralized information as to availability and location of direct services and assistance aids in obtaining access to needed services.
4. Transportation	4. Addresses the need of those who have no physical access to available services by bringing people to programs.
5. Escort services	5. Provides assistance on a one-to-one basis for those who are experiencing difficulty in obtaining services.
6. Occupational counseling and career information	6. Occupational exploration opportunities, knowledge of job opportunities, awareness of work expectations, skill in career decision-making, vocational maturity and job search skills required to facilitate re-entry into the work force.
7. Personal assistance • Shopping services • Reader services • Letter writing services • Home visitation • Telephone contacts	7. Augments the capabilities of older persons to function independently in a home environment.
8. Nutritional services	8. Meals provided to older persons on a regular basis to maintain nutritional balance.
9. Recreational and social services	9. Provide individual and group opportunities for avocational and leisure time activities that contribute to social adjustment and physical well-being.

Supportive Services	Rationale
10. Homemaking services	10. Assistance in food preparation, shopping, light housekeeping, home finances and other household management assistance serves to increase the ability of the elderly to live free of institutional constraints.
11. Home health services	11. Provision of at-home health care such as personal grooming, rehabilitative and restorative nursing, physical therapy, occupational therapy, speech therapy and home health education.
12. Legal aid services	12. Aid in financial and estate management and in other matters of a legal nature.

THE DECISION TO PROVIDE SUPPORTIVE SERVICES

Few educators would argue that vocational guidance and counseling is not a necessary educational support function. However, the case is not as clear-cut with respect to transportation services and even less so for home health service. The issue at question is whether education should be involved in the provision of direct social services.

It can be argued that education has a societal role of enhancing general cognitive awareness and of developing specific abilities, competencies and skills required for effective social functioning. Since the function of direct services is not primarily to develop human knowledges and capabilities, it follows according to the argument that provision of direct social services is not an educational concern.

A counter-argument assumes that education is a central part of all aspects of community life. As articulated in the community education philosophy, ". . . the school is an integral part of the local human service delivery system" [Sec. 802 (a)(1) P.L. 95-561]. By defining education as an integral part of the community, education has an obligation to be involved with other community groups, organizations and agencies in the delivery of human services.

Thus, the decision whether to offer supportive services to older persons is initially dependent upon the perceived role of education. Once the decision to provide supportive services has been made, these are several subsequent decisions that must be considered:

- types of supportive services to be provided
- level of resources to be allocated
- who should provide the services

Type of Supportive Services Offered

The following chart depicts some major barriers to provision of services to older persons and selected supportive services which could be provided to remove them.

Barriers Faced by Older Persons	Supportive Services
Psychological:	
Fear of failure	Counseling
Fear of unfamiliar surroundings	Volunteer guides; open house and orientation
Fear of going out at night	Escorts; security officers on duty at end of class
Physical:	
Transportation	School buses; carpools
Social:	
Lack of education	Remedial education

Level of Resources

The level of resources allocated to providing supportive services should be based on the priority allocated to the services, the cost of services, and the expected client impact. For example, transportation is a major barrier for many older persons, who may no longer drive or may not own a car. In rural areas, where public transportation is not an alternative, transportation is a particularly acute problem. If providing transportation is given high priority, costs of alternatives must be evaluated.

In the example of transportation, the following alternatives may be considered:

1. purchase a van
2. use public school buses
3. borrow bus from local CETA program or church
4. provide training in how to be more mobile

The first alternative, to purchase a van, would be the most expensive. Its impact would be limited to increasing the accessibility of the educational program. Similar transportation problems would very likely be encountered in relation to post-program employment.

The use of public school buses or a borrowed bus from another program could increase accessibility at little or no cost. Borrowing a bus from an outside service introduces the idea of interagency coordination in service delivery. An interagency approach to problem solution provides a greater number of alternatives. (See Chapter Three)

The fourth alternative demonstrates that direct services to older persons may not be the only way to circumvent problems. Transportation problems can be dealt with by giving older persons instruction in how to be more mobile. An approach which helps older persons to solve their own problems may have has a greater potential for long-term impact. As mentioned, if transportation is a barrier to attending education and training, it likely will be a barrier to employment as well.

Who Should Provide Services

Not all services can or should be offered within the context of a vocational education program. Some social services are best arranged through information and referral to other agencies/organizations. The Area Agency on Aging is the primary candidate for engineering a coordinated service network to insure that older persons receive needed social services. It is not necessary nor wise for vocational education to duplicate services already available in the community. However, those services critical to participation should be included in the budget for the vocational education program.

Four decisions are possible:

1. no supportive services provided
2. supportive services provided as part of vocational education program
3. supportive services provided through interagency agreements
4. supportive services provided through sub-contracts

The first alternative tends to narrow the potential number of older persons who can participate, since no arrangements are made to remove the barriers that exist for some. The second approach signifies a commitment of resources to supportive services as well as direct methods of employability development. The third and fourth approaches utilize the expertise of other agencies to provide services.

The following chart indicates advantages and disadvantages of each process:

Process	Advantages	Disadvantages
No supportive services provided	No cost to program No staff time	Limits participation of older persons
Supportive services as integral part of program	Older persons have needed services coordinated through single source Increased participation by larger cross-section of older persons	High cost to program Services may not be delivered by experts Services may become primary goal
Supportive services arranged through interagency agreement	Little or no cost to program Referrals can be made to and from vocational education programs Duplication of service avoided Services provided by experts	Cooperation difficult to operationalize at line level No control over quality of services Older person must travel to different agencies
Supportive services provided through subcontract	Control of services without responsibility for delivery Services provided by experts	Older person must develop relationship with more than one agency High cost to program Difficult to insure a coordinated approach

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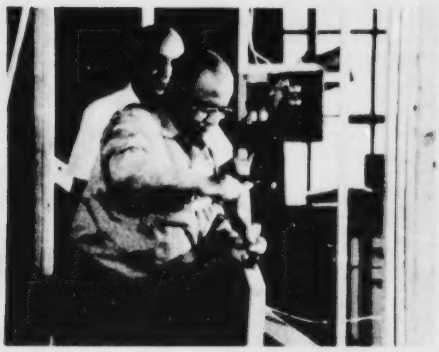

6. INSTRUCTION

Instruction is defined as interaction between the instructor, the learner and the learning environment for the purpose of inducing a desired behavioral change. Consequently, the design and delivery of instruction to mature adults is significantly influenced by the assumptions as to the role of the learner, the instructor and the nature and purpose of the learning process.

Four key assumptions are commonly drawn about the adult learner and the adult learning process:

Key Learning Assumptions

1. Adult readiness to learn is dependent upon a need to acquire competencies to perform valued life tasks;
2. Adult learning is self-directed and self-motivated;
3. Adult learning should be approached from a problem-centered process orientation rather than as a subject matter content to be mastered;
4. Instructors should function as facilitators and resource persons.

THE OLDER ADULT AS LEARNER

Research and experience have identified certain characteristics of older persons that impact on the design and delivery of vocational instruction. Some are age-related, others are descriptive of all adults. Age-related characteristics should be interpreted as tendencies based on group averages. Considerable variation exists within any age group. Many older persons may indeed perform as well or better than younger persons on certain tasks. The implication is that whereas the findings are on the average descriptive of older adults, they may not accurately characterize the capabilities of any individual mature learner.

Older learners can be expected to:

- Express a greater desire for certainty. *Older persons are more reluctant to decide until they have accumulated sufficient information to support their choice.*
- Exhibit caution in their approach to new situations. *They tend not to initiate action until sufficient information has been obtained.*
- Avoid risk whenever possible. *As a means of reducing risk, older persons show a tendency to avoid making a decision. As a consequence, errors of omission frequently exceed those of commission.*
- Express a greater preference for dealing with the concrete. *This is evidenced by a progressive reliance on past experience as a guide for future action.*
- Experience difficulty in eliminating irrelevant information. *Experiments show that older adults have increasing difficulty in identifying and sorting out redundant and nonuseful information.*
- Respond at a slower rate. *Time to respond to environmental stimulation increases with age. Experimental evidence indicates that this slowing with age may be a function of changes in the central nervous system.*
- Show differential decline in abilities. *Verbal skills are relatively age insensitive, whereas psychomotor skills involving manipulative skills and perpetual functions decline appreciably with age.*
- Suffer reduced sensory acuity. *Older people simply do not see nor hear as well. There is evidence that sensitivity of taste, smell and pain also decreases with age.*
- Experience a diminution in memory. *Generally, recall diminishes with age in contrast with recognition which remains largely unaffected by age.*

FACILITATIVE INSTRUCTIONAL STRATEGIES

The instructor as a facilitator and resource person can play a significant role in helping the mature learner improve learning performance. In order to be effective in this role, the vocational instructor must have available a repertoire of learning strategies that older adults can use to assist them in seeking, acquiring, organizing, retrieving and using information.

A Sample of Adult Learning Strategies

Strategy	Rationale
1. Make behavioral objectives available to the learner early in the learning process. Use explicit action verbs to convey precisely what activity is expected.	1. Helps adult learners identify relevant information; increases learning efficiency by allowing learner to eliminate non-relevant information.
2. Provide an abridged version (advance organizers) of the information required to perform the task. These advance organizers may be in the form of a condensed synoposis of material to be learned, outlines, abstracts, demonstrations or other devices that summarize and integrate information.	2. Gives the learners a framework for categorizing, storing and recalling information. Facilitates concept formation by giving a preview of the information content to be learned
3. Present questions as a prelude to the learning task. Questions may pertain either to conceptual or factual content materials.	3. Primes the learner to attend to what is important to learn. Allows the learner to build a cognitive structure as a foundation for subsequent learning.
4. Encourage adult learners to generate and use verbal and visual mediators. Verbal mediators are typified by acronyms, rhymes or other such techniques whereby a word or verbal symbol is associated with material to be learned. Visual mediators are cognitive images such as maps, graphs, charts, diagrams pictures or other mental imagery that facilitate coding and recall of information.	4. Mediators aid recall by providing an associational linkage between the mediators and discrete units (chunks) of information to be learned. Recall of the mediators prompts recall of the informational chunk associated with the symbolic mediator. The "method of loci" illustrates this principle. In this technique, the learner is to imagine a sequence of familiar locations; e.g., a walk through their home. Each location (room) is to be associated with a particular concept/fact to be learned. By mentally walking through the house, the learner is prompted to recall what information is associated with each room.
5. Promote use of sensory cues to highlight important information. Sensory cues are nonverbal devices that serve as decisional criteria. Examples of cues include color coding, italics, bold printing, underlining, indentation, or other visual/auditory means of indicating the need for special attention.	5. Assists learner in identifying what informational elements are especially important for learning task performance. By providing a distinct decision criteria, cues allow the learner to more easily discriminate between what should be attended to and what can be safely ignored.
6. Sequence the content to be learned according to a logical progression. Organizational options are:	6. Structures the learning process so as to facilitate positive transfer as the learner progresses through the stages. Enables the learner to build a progressive understanding of concepts and their relationships.
Simple-to-complex	Enables learner to master easier materials first and then transfer to more complex
General to-specific	Emphasizes the general principal, theme or concept thereby providing a framework for subsequent interpretation of facts. Less memorization of facts in the early stages is especially helpful for older learners.
Concrete-to-abstract	Provides opportunity to learn concrete-manipulative content first. Reduces possibilities of early failure since mature learners tend to learn concrete content more easily.
Chronological	Easy and instinctive form to use. Mature learners are accustomed to time sequences. Lends itself well to cause-effect relations.

Strategy	Rationale
7. Structure learning into a sequence of learning tasks. Each learning task should:	7. Learning tasks allow for a problem-oriented individualized approach to adult learning.
be self-contained	Each learning task should deal with an integral whole that can provide an organizing logic, e.g., a concept, principle, theory, relation or observed phenomena.
have clear and concise instructions and directions	Instructions/directions should explain what is to be done, why it is to be done, where it is to be done, when it is to be done and how it should be done.
result in the attainment of a behavioral objective	Tasks that are results oriented are more likely to have meaning for older learners.
be clustered according to an organizational scheme	Tasks should be grouped according to some logical organizing principle that is readily apparent to the older learner. This organizing principle may be a typology of content matter, components of a content system under consideration or functions of a content system.
be progressively organized within clusters according to complexity of content and difficulty level	Sequencing of tasks so that each task builds on the preceding ones insures positive transfer of learning. Since early tasks are also the less difficult, there is less demand placed on learners in the early stages of learning with reduced chance of early failure.
progress in relatively small steps	Developing learning tasks that focus on small increments of learning has advantages for older learners. Such tasks are generally easier to learn. They allow for a greater sense of accomplishment and provide reinforcement sooner than do more comprehensive and complex tasks.
progress at a slow pace, or be self-paced	Older learners often have difficulty in a paced learning situation.
avoid excessive short-term memory requirements	Ability to recall from short-term memory declines with age.
8. Provide frequent and varied incentives for continued learning. Examples are instructors expressions of supportiveness and helpfulness, use of praise regardless of correctness of response, provision of frequent and varied feedbacks as to performance results, reinforcement of positive responses with minimum delay, provision for multiple reinforcements	8. Incentives and a positive learning climate are essential for adult learning. Older adults need assurances to overcome institutionalized age stereotypes and resultant diminished self-concept that may curtail their learning effectiveness.
9. Make as much use of individual learner self-assessment as possible. Avoid use of normative comparisions, especially with younger group.	9. Older learners should be encouraged to assess their own performance against established benchmarks. Learning tasks should have progressive benchmarks that can be used to define a series of objective performance goals. Participation of the learners in the assessment of their performance results enhances the utility of the results and diminishes the fear of failure.

The Discovery Method

Many of the aforementioned strategies have been incorporated into a method of training known as the "Discovery Method." The basic notion of this method is that the trainees learn for themselves how and why things work by following an exploratory path. This path consists of sequential learning tasks designed to permit the learner to solve problems through the discovery of the right response. Tasks are reduced in complexity and only the essential features retained. The instructor, in contrast to the usual role, allocates tasks, introduces the problems, monitors progress, answers questions, offers encouragement and praise and dispenses reinforcements.

The effectiveness of the method for older workers was evaluated in a series of international demonstration projects. In the United States project, learning achievement under the Discovery Method was compared with that under the traditional method for machine operating, data processing and electrical work. Performance scores in machine shop and data processing increased in magnitude by an order of between one-third and one-half.

INSTRUCTIONAL OPTIONS

As with any special needs population, vocational education has three basic options for the delivery of instructional services. Older persons can be regarded as being no different than any other adult student. That is, they can be "mainstreamed" into the regular programs with no distinctions made. Two, they can be served in regular programs and supplemental support services offered on an individualized basis to meet special needs. Three, they can be served in separate programs designed specifically for older adults.

Regular Programs

Servicing older adults in regular programs assumes either: 1) that the needs and learning patterns of older adults are no different from the general population of adults, *or* 2) that there is sufficient flexibility in the regular instructional methods to accommodate their special learning needs. Experimental evidence and the founding of educational gerontology as a discipline casts doubts on the validity of the former. Flexibility of instructional methods to accommodate to individual need depends upon the extent of individualization permitted by the instructional process. To be effective in serving mature learners requires the capacity to utilize those facilitating instructional strategies previously discussed.

Regular programs should therefore be evaluated to determine their inherent service flexibility. The following evaluative criteria are offered:

FLEXIBILITY CRITERIA

		Yes	No
1.	Does the program alter the rate of content presentation in recognition of the needs of individual learners?	[ ]	[ ]
2.	Can the mode of instruction be altered in recognition of the needs of individual learners?	[ ]	[ ]
3.	Is there provision for differential emphasis on short term memory and recall?	[ ]	[ ]
4.	Does the program allow for instructional options other than verbal instruction?	[ ]	[ ]
5.	Does the program have the capacity to change content, mode or rate of learning depending on experiences of the adult student?	[ ]	[ ]
6.	Are there allowances for variation in the kinds and rate of knowledge of results provided?	[ ]	[ ]
7.	Is there provision for learners' self assessment?	[ ]	[ ]

Regular Programs with Supplemental Support

This delivery method assumes that the needs of mature learners can be satisfied by augmenting the regular program instructional fare. The augmentation can be regarded as an "add on" that when performed will modify the instruction process so as to enable it to meet the unique needs of an individual older learner.

Examples of supplemental instructional services include:

- tutorial services
- memory aids
- text learning strategies
- advance organizers
- note taking techniques
- stimulus cueing systems
- supplemental remedial assignments
- auxiliary programmed learning
- special attention and incentives
- modified instructional materials

The intent of all support services is to overcome some deficit that is inhibiting performance in the regular program. To the extent that the deficit can be remediated by the provision of peripheral support services, this can be a viable option for the older leraner. Some of the support services may be independent of instructional content with consequent greater applicability and lower per user costs. Others are content and user dependent and may, in some cases, be designed solely to the requirements of a single learner.

However, if the learning deficit results from a mismatch of the older learner abilities and the demands of the regular instructional process, then provision of support services will not get at the root cause. In these cases, remediation will depend on the flexibility of the regular instructional process to adjust to individual needs and constraints.

Separate Programs

The rationale for separate programs is that specialized learning requirements are so divergent that they cannot be met through a regular program even when supplemented by specialized support services. Thus, a careful analysis of the needs and requirements of older learners is a necessary prerequisite to the decision to offer a separate program.

In addition to the psychological and physiological changes previously discussed, the attitudes and interests of older persons have implications for program decisions. A survey of persons 46-70 years old showed the following responses to questions designed to uncover any barriers to attendance:

> Fifty-five percent of respondents said they could attend job-related training at night.
>
> Forty-six percent said they could attend classes 3-5 hours a day.
>
> Sixty-five percent said they could travel 1-10 miles for part-time training, and another thirty-five percent said they could travel 11-20 miles.[1]

These findings are given more relevance when compared with younger students. Older persons did not report they could attend classes on weekends though younger ones did. That the majority said they could attend night classes is probably influenced by the broad age range of respondents. In many cases, older persons are fearful of venturing out at night.

A community college survey found the following preferences for the length of training:

LENGTH OF TRAINING DESIRED[2]

6 weeks or less	28%
6 months or less	37%
1 year or less	11%
2-year degree	5%

It appears from surveys that older persons are more likely to attend classes which are easily accessible. Younger students were willing to travel more than thirty miles for part-time job-related training. And when training is extended to full-time, older persons report that they were only able to travel one to ten miles.[3] When asked where they would like to see programs located, an overwhelming 74% of older persons named community centers.[4] Sixty-three percent chose school or college buildings.[5]

A variety of special program delivery options exist. Examples for consideration include:

1. special groupings or sections of older learners within regular programs;
2. special program(s) restricted to older students;
3. special organizational unit on campus devoted to older learners; e.g., senior service centers.
4. satellite centers at centralized rural locations or in urban areas with heavy concentration of older persons; and
5. extension programs offered on location in community centers, schools, shopping centers, conjugate senior housing projects, churches, nursing homes.

The choice of the most appropriate delivery option depends upon a host of factors. These factors include spatial distribution of aggregate demand for programs, sufficient demand in any service area to warrant offering programs, availability of resources, equipment requirements and commitment to serve older persons. The weighing of these factors in the final decision must of necessity reflect the current conditions and prevalent values of each local community.

NOTES

[1]Copa, George H. and Clyde F. Maurice, *Demand for Additional Job Related Training by Minnesota Residents Age 16 and Over, 1977*. Minneapolis, Minnesota: University of Minnesota, Minnesota Research and Development Center for Vocational Education, December 1978.

[2]Galvin, Kevin and others, *Educational and Retraining Needs of Older Adults*. Final Project Report. Los Angeles, California: Los Angeles Community College District, California; Southern California Community College Institutional Research Association, March 1975.

[3]Copa, December 1978, op. cit.

[4]Galvin, March 1975, op. cit.

[5]Galvin, March 1975, ibid.

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7. EMPLOYMENT SERVICES

Employment that is both socially productive and individually rewarding is the bottom line return on vocational service to older persons. To assure this end, employment services are a critical component of vocational programs.

Employment services are defined to consist of:

- **Placement services;**
- **Follow-up services; and**
- **Career development**

PLACEMENT SERVICES

Placement operates as an intermediary in a local labor market to facilitate supply-demand matching. Basically, placement involves three significant components:

- **assessment of individual job needs;**
- **location of job vacancies; and**
- **matching individual needs and job requirements.**

Employability Assessment

The skills, interests and special employment needs should be assessed for each older person seeking employment. The assessment should provide answers to the following questions:

ASSESSMENT QUESTIONS

1. ***What skills does the older applicant possess?*** An inventory of the skills possessed by the older person is a necessary prerequisite to informed placement. Skills may be assessed by asking the applicant to list all paid jobs, voluntary activities and/or training sequences that have proven to be major learning experiences. It is important to emphasize that these activities include non-job settings. For each activity listed, the applicant is to enumerate all competencies/skills learned or developed by that activity. To assist the applicant in identifying skills possessed, a check list of common skills should be provided. A readily available source is the DATA, PEOPLE, THINGS skills used in the *Dictionary of Occupational Titles* (DOT).
2. ***What are the interests of the older applicant?*** For each major learning activity previously defined, the applicant should be asked to identify those aspects of the activity that are most liked, least liked and the reasons for the likes and dislikes. This information provides valuable insights into the employment related interests, values and preferences of the applicant. This information may be supplemented by information provided by commercially available interest inventories such as the Kuder Preference Record Vocational and the Kuder Preference Personal.
3. ***What special employment needs does the older applicant have?*** Each applicant should be interviewed to determine such factors as reason(s) for seeking employment, amount needed to be earned, extent of availability for work (full or part time), hours of the day available for work, type of work desired, availability of transportation and physical and/or psychological considerations that may limit placement opportunities.

Location of Job Vacancies

Effective placement requires knowledge of job vacancies. Information on local job vacancies may be obtained from the following sources:

EMPLOYMENT SERVICE REPORTS

Employment Security Automated Reporting System (ESARS)

Provides monthly and quarterly summaries of job vacancies classified by DOT codes for local offices.

Job Bank Employment Service Reports (Job Bank)

Computer listing of unfilled job openings on a given day listed with local Employment Service offices. Information on each unfilled job opening includes geographic location, occupational title and code, wage rate, job requirements.

Job Bank Frequently Listed Openings (JOB-FLO)

Provides a hard copy or microfiche listing of high demand jobs from previous month Job Bank listing. Information includes occupations in demand, industries seeking to employ workers in these occupations, average pay and job requirements.

Job Bank Openings Summary Data (JOBS)

Monthly microfiche publication listing Job Bank entries during the previous month classified by occupations. Information includes number of jobs unfilled at end of month, unfilled jobs by DOT codes, employee job title and pay range.

Occupations in Demand at Job Service Offices (OID)

A national summary of occupations in demand as determined from national Job Bank openings. Areas having a significant number of openings are identified.

Limitations

- Employer names are supressed on all reports.
- Only jobs listed with Employment Service local offices are included in the coverage.
- Jobs listed with the Employment Service represent a small share of total job vacancies.
- Not all areas have the Job Bank program.

VOLUNTARY NON-PROFIT AGENCIES FOR OLDER JOB SEEKERS.

A number of agencies offer free job development and placement services especially for older job seekers.

Limitations

- Unevenly distributed throughout nation.
- Differ in size and sophistication.
- May deal only with a particular aging group.

PRIVATE EMPLOYMENT AGENCIES.

Maintain listings of full time, part time and temporary job vacancies. Charge a fee for placement services which may be paid by the employer. Some private agencies such as Mature Temps, Inc. specialize in placement of older job seekers.

Limitations

- Private agencies may screen out older applicants.
- Older job seekers may not be able to pay fee.

TITLE V CONTRACTORS.

Title V of the Older Americans Act, as amended, known as the Senior Community Services Employment Program, provides jobs in community service agencies. Participation is restricted to persons who are 55 years of age or older and classified as low income. Participants are provided job placement in non-subsidized jobs. Organizations operating programs include Green Thumb, an affiliate of the National Farmers Union, National Council of Senior Citizens, National Retired Teachers Association/American Association of Retired Persons, National Council on Aging, and the U.S. Forest Service.

Limitations

- Restricted to low income job seekers.
- Offers a limited number of positions.

PERSONAL CONTACT WITH EMPLOYERS.

Employers may be contacted in person, by phone or by letter to determine availability of job openings. Information obtained should generally include:

Employer's name, address and telephone number;
Job title and DOT code;
Summary of job duties and requirements;
Skill requirements;
Salary; and
Duration.

Contact could be on an *ad hoc* basis or according to a periodic schedule. A formal job bank system patterned after the Employment Service could be established and maintained with employers encouraged to list openings as they arise.

Limitations

- May duplicate services provided by Employment Service.
- Requires continuing commitment of resources to maintain on an on going basis.
- Too frequent contact may impair employer relations.

REVIEW OF CLASSIFIED ADS IN LOCAL NEWSPAPERS.

Job openings advertised in the local newspaper can be scanned to locate job vacancies.

Limitations

- Not all job openings may be listed.
- Advertised job openings may not actually exist.
- The same job opening may be listed in multiple advertisements.

Applicant Job Matching

The third component in placement is the matching of the older individual with the requirements of available job openings. The employment-related skills identified in the employability assessment should be compared with the reported interest areas. Only those skills that correspond to activities reported as most liked should be considered in the matching process.

Information on available job openings should be searched to locate all jobs that appear to match the needs and skills of the older applicant. The extent of matching can be determined by a point-by-point comparison on the following dimensions:

MATCHING REQUIREMENTS

Skills possessed	*vs*	skills required;
Salary needed	*vs*	salary paid;
Availability	*vs*	job duties and requirements;
Type work desired	*vs*	job duties and requirements;
Physical/psychological constraints	*vs*	job duties and requirements.

Each dimension should be rated according to extent of judged congruence where higher ratings indicate greater person-job compatibility. The ratings can then be summed across the dimension for every job initially considered a possibility for the applicant and the jobs ranked according to their summed ratings. The rank ordering provides a listing of job openings prioritized according to the extent of the match. Those jobs with the highest rankings should be reviewed with the applicant and the applicant referred to jobs according to order of preference.

FOLLOW-UP SERVICES

Follow-up involves contact with the older placement and/or the employer to determine how well the placement suits the needs of both the older person and the employer. Follow-up of older placements should occur at three separate times:

- immediately after a job interview;
- after an initial job orientation period; and
- periodically and on-demand during the first year of employment.

Post-interview Follow-up

Contact should be initiated with the employer immediately after the scheduled job interview. The purpose of this follow-up is to assess the employer's opinion of the referred applicant and the likelihood of a placement. If the employer indicates dissatisfaction with the applicant, the reasons for this dissatisfaction should be probed. In those instances where the employer is not convinced, the areas of uncertainty should be identified and an attempt made to resolve those concerns. The effect of age role sterotyping in shaping the employer's attitude should be determined and steps taken to counter an age bias if present.

For those cases of rejection, a debriefing should be held with the applicant. If it is determined that the causes for rejection are applicant-related, remediation should be undertaken. This might entail additional training in resume writing and/or interview protocol.

Post-orientation Follow-up

After the older placement has been on the job sufficiently long to have become oriented, a follow-up should be initiated with both the older person and the employer. This follow-up can be in person or by telephone. Personal contact is generally preferable since it offers greater opportunity for personal interaction. Questionnaires should generally be avoided because of the traditionally low response rates and the impersonal nature of most questionnaires.

Post-orientation follow-up from both the employer and employee serve the following functions:

From the Employer

- evaluation of employee performance
- identification of problems inhibiting effectiveness
- provision of contact for future placements

From the Employee

- monitoring of employee satisfaction
- identification of problems inhibiting performance
- assessment of need for further supportive services

The information obtained from both employer and employee follow-up should be analyzed and the implications for remedial action determined. Possible action alternatives are dependent upon whether problems are employee- or organization-induced.

Possible Alternatives for	
Employee induced problems	**Organization induced problems**
• further training	• job redesign
• personal counseling	• training to overcome age sterotyping
• supportive services to overcome barriers	• transfer to another job
• referral to another job	

Subsequent Follow-up

Follow-up should be conducted periodically during the first year of employment. A suggested schedule would be to perform follow-up at three-, six- and twelve-month intervals. In that manner, sufficient opportunity would be provided to monitor the employee at various stages during the acclimation period.

Provision should also be made for contacts with employers and/or older employees upon demand. This flexibility allows for attendance to problems as they develop and before they become exacerbated through neglect. Employers should be informed of the availability of this service at the time of placement.

CAREER DEVELOPMENT

Up to now, the discussion has centered on the provision of employment services to older persons seeking entry employment. However, there are many currently employed older persons who because of restricted mobility and advancing years experience a steady decline in their productive contribution. Reversal of this waste of human potential will require enlightened personnel policies and progressive work force planning that recognize the career development needs of employees of all ages at all organizational levels.

Vocational education is in a unique position to render assistance. As specialists in the development of human resources, vocational education could efficiently and effectively assist employers by assuming a training and development function. Since for many employers, particularly the small employers, it may not be economical to maintain an in-house training capacity, vocational education with its resident expertise and developed physical facilities would appear a cost-effective alternative.

Private Sector Training and Development

Training and developmental activities that could be provided the private sector which have direct impact for the older worker include:

- in-service retraining for senior salaried personnel and wage earners;
- special training, continuing education and degree programs for older workers as part of planned career development programs to up-grade the quality of the work force;
- in-service updating and up-grading of skills with special allowances for the differential instructional needs of older workers;

Training and Development Activities *(continued)*

- programs to overcome the adverse effects of age role stereotyping;
- career development counseling for the middle-aged and older worker;
- pre-retirement counseling; and
- provision of assistance to older workers who desire to embark upon a second career.

Job Development

Vocational education has traditionally regarded itself as functioning to alter the supply of labor so as to achieve a match with the market demand for labor. Demand has been generally regarded as determined by external market forces beyond the control of vocational education and hence not its responsibility.

With the contemporary emphasis on vocational education as a means of redressing social inequities, the continuing utility of 'supply-side' orientation has come under increasing scrutiny. The legislatively mandated accountability for placement of special populations has extended vocational education's responsibility for special populations into the market-place. Since placements of special populations are dependent upon reduction of market barriers to their employment, the necessity for vocational education intervention is clear.

Job development is the principal media for demand-side intervention. Three basic approaches to the development of job opportunities for special populations exist. They are:

1. restructuring of existing jobs to better fit the capabilities of special groups;
2. creation of new jobs that can be effectively performed by special groups; and
3. overcoming employer resistance to hiring special group members.

Job Restructuring

Job restructuring as applied to older persons involves working with employers to modify job duties and requirements to suit the needs of older workers. The modification could apply to identified job vacancies or to existing jobs currently occupied by older workers.

Two approaches to restructuring are currently being used. One approach concentrates on altering the time requirements of the job so as to better accommodate the needs of older workers. The second focuses on altering the tasks and/or their sequence so as to produce a set of requirements within the performance capabilities of older workers.

Altering time requirements. Methods of temporal job restructuring have produced alternatives that benefit employers as well as older workers.

SCHEDULE ALTERNATIVES	
Part-time work	Can be as a part of each working day or as a full-time assignment for several days a week.
Work-sharing	Splitting one job into two or more part-time jobs. Has a financial advantage in that total hours worked can exceed 40 hours without having to pay overtime.
Flexi-time	Employees have option as to when and how long they work. A common application is to work four ten hour days. Employees have choice as to their day off.

Task modification. Jobs can be rearranged or modified to meet needs of older workers. Some typical job factors limiting the performance of older workers and suggested modifications are:

PERFORMANCE LIMITERS	POSSIBLE MODIFICATIONS
Physical demands	1. Redesign job to reduce muscular exertion 2. Utilize mechanical instead of human efforts 3. Redesign machine/equipment controls só as to reduce force needed to operate
Postural fatigue	1. Redesign job so that operator can sit down or otherwise vary posture 2. Reduce the size of the work area
Environmental stress	1. Isolate worker from debilitating environmental stresses, e.g. high temperature, noise, dust and other atmospheric pollutants and contaminants
Rapid pacing	1. Allow worker to vary pace 2. Avoid sudden spurts
Sensory discrimination	1. Provide enhanced illumination, larger stimuli, color coding 2. Avoid necessity to make fine perceptual judgements
Monotony and boredom	1. Vary sequence of job duties 2. Rotate worker across different jobs 3. Provide for group performance

Job Creation

Job creation implies the birth of a job vacancy that did not previously exist. For vocational education job creation can be accomplished by working with private and public employers to find new employment opportunities for older persons and by promotion of entrepreneurship among older persons.

Showing employers need for new jobs. Need for new jobs can be assessed by a thorough review of the existing job structure. This review should concentrate on:

- description of current jobs;
- duties that are part of current job descriptions but are currently not being performed;
- reasons for their omission; and
- tasks/activities that the organization could or should offer to improve effectiveness.

Based on this information, potential areas for new jobs could be identified. New jobs stem from a combination or reassignment of existing task duties so as to result in a more efficient organization or from new tasks that add to overall operational effectiveness. In either case, evidence should be presented to the employer demonstrating the cost-effectiveness of the recommended new job and the benefit of filling the job with an older person.

Community service volunteers. Communities have need for a host of community services that because of lack of resources are never provided. Older persons functioning in a volunteer capacity are an ideal resource to strengthen community services. Some community service jobs may require considerable skill and expertise and some could be performed with minimal training. In either case, vocational educational could perform a unique public service to community and country by providing training and placement services to older persons as community service volunteers.

EXAMPLES OF COMMUNITY SERVICE JOB OPTIONS[1]

- role models to disadvantaged youth
- job finders
- peer counselors
- para-legal aides
- home health aides
- rehabilitation aides
- home management assistants
- nutrition advisors
- readers and communicators
- shopping assistance helpers
- home repair specialists
- energy conservation advisors
- monitors for pollution and other health hazards
- safety inspectors
- career development specialists
- retirement counselors
- recreational/social advisors
- art conservators and technicians
- educational volunteers (See Chapter 8)

Entrepreneurship. Entrepreneurship activities make full use of the existing experience and skill of older persons. Steps in the creation of jobs through entrepreneurship include:

1. Establishment of consortia of education, business, industry and government to:
   - provide financial aid to older persons to assist them in capitalizing small businesses;
   - assist in market analyses;
   - advise on the design of programs to develop entrepreneurship skills in older persons.
2. Provision of opportunitites for older persons to practice entrepreneurial skills in:
   - student projects;
   - school/institution-run stores or other operations;
   - cooperatives.
3. Make available existing expertise to provide advice and assistance in the formation of new small businesses through:
   - assistance from local business community;
   - use of vocational instructors in an advisory capacity to new small business.

Hobbies and avocational skills of older persons often provide a basis for a home-based small business. Examples of possible home business enterprises are:

Catering service;
Specialized printing;
Selling handicrafts;
Minor home repair/service;
Home maintenance service;
Music/Art/Drama teacher;
Tutoring service;
Pet sitting;
Gardening/lawn maintenance service jewelry making;
Baby-sitting services;
Taxi service;
Para-legal services;
Sewing/tailoring;
Photography;
Organizing local special events;
Selling stamps/coins/antiques;
House tending;
Contracting with businesses to perform specific services;
Auto repair service;
Home appliance repair service;
Day care services for fragile elderly; and
Companion service for elderly.

Overcoming Age-role Stereotyping

Employment opportunities for older persons are often restricted because of commonly held stereotypes. The following common stereotypes are compared with research results:

OLDER WORKER STEREOTYPES	RESEARCH FINDINGS
Declining productivity	No consistent pattern of superior productivity in any age group.
Poor attendance	As good or better than younger workers; less turnover.
Obsolescence in learning capacity	Little evidence to suggest significant change in learning capacity.
Less motivated	Greater job satisfaction, less stress on job, less drug use, fewer admissions to psychiatric treatment.
Prone to accidents	Experience less accidents in situation requiring judgement based on experience and expectation of hazard.
Decreased intellectual functioning	Intelligence remains constant for most until at least age 70.

Dispelling age stereotypes as barriers to job development will require modification of employer attitudes. Vocational education will have to marshal convincing evidence to support arguments to hire older workers. Evidence to support an advocacy for employment of older persons can be obtained from 1) examples of nationwide employment practices, and 2) specific case examples drawn from the local community.

National examples. Numerous firms have been referenced as having innovative approaches to the development and training of older workers.

FIRM	EMPLOYMENT PRACTICES
Bankers Life & Casualty Co.	Special emphasis on hiring people 65 and older.
Texas Refinery Co.	Found older salespersons to be especially effective.
Evans Products	Routinely hires workers over 40 for manufacture of hardboard, glass walls and battery separators.
Chesopee Manufacturing Co.	Application of flexi-time (alternative work schedules).
Exxon Corporation	Permitted employees over 65 to continue to accrue previous benefits.
San Francisco Unified School District	Older teachers allowed to work part-time without losing full-time pension benefits.
Grumman Aerospace	Uses performance assessment as a tool in career development.
Atlantic Richfield Co. Polaroid Corporation	Offer a pre-retirement program to older workers.
Wrigley Corporation	Provides for phased retirement.
Northrop Corporation	Found call back of annuitants from retirement on temporary basis to be cost-effective.
Lockheed Corporation	Retained a consultant to teach older employees how to start their own businesses.

Local case examples. Whereas national examples are useful, evidence of positive local experience with older workers provides more powerful persuasion. Local experience can come from a variety of sources:

- testimonial letters from employers;
- personal contact from employers of older workers to prospective employers;
- speeches at local business organizations; and
- preparation of individual case examples describing employment successes of older workers.

NOTE

[1]National Committee on Careers for Older Americans. *Older Americans: An Untapped Resource.* Washington, DC: Academy for Educational Development, 1979, p. 7.

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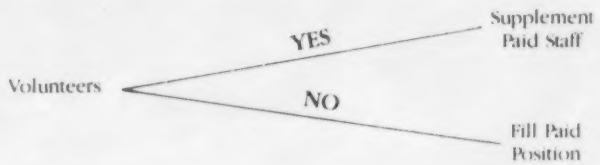
8. INVOLVING OLDER PERSONS AS VOLUNTEERS

Previous chapters have focused largely on older persons as the recipients of vocational education instruction and services. However, older persons can also provide services to vocational education. This chapter describes means to increase the involvement of older persons in vocational education by using them as volunteers.

The involvement as volunteers within an educational system should be preceded by an assessment of the institutional climate concerning use of volunteers. In part, this entails an assessment of the potential roles which volunteers could serve. It is important to distinguish between the types of roles which could be performed by volunteers, but which should be performed by paid personnel. Under no circumstances should volunteers be utilized to perform jobs which would be paid positions in the absence of volunteers. A cardinal principle is that volunteers must be utilized to supplement and never to supplant paid educational staff.



The form this distinction takes depends as much upon local circumstances as it does upon role responsibilities. For example, if vocational instructors currently have responsibility for placing their students in jobs, volunteers might provide assistance to instructors in making student placements. However, if there is a placement office which fulfills this function, volunteers should not be utilized to fill a position in the placement office which would otherwise be a paid position.

POTENTIAL ROLES

Older persons serving as volunteers in educational institutions have performed a variety of duties which have direct application to vocational education. In one state, older retired persons served as volunteers in three postsecondary institutions and performed such functions as:

- conducted surveys of non returning students;
- consulted on development of technology curriculum;
- critiqued technical writing of students;
- provided office-style dictation to secretarial class;
- followed up suspended students;
- assisted recruitment specialist;
- worked in day care center;
- helped students develop resumes;
- helped students understand criteria for employment in business;
- provided business like situations in class;
- supervised students in field internships;
- assisted financial management department.[1]

At the secondary level and below, older volunteers have:

- served as tutors for underachieving youth;
- taught after-school classes in crafts, carpentry, electricity and Spanish;[2]
- served as translators for limited English-speaking students;[3]
- arranged field trips for students;
- established career guidance centers;
- updated career guidance materials;
- advised schools and students on available scholarships;
- assisted students with their homework;
- served as classroom assistants;
- worked with physically and emotionally handicapped students.[4]

The potential roles which older volunteers can fill in a vocational education program are indeed varied. Furthermore, their involvement in the vocational education program can be mutually rewarding. Older volunteers provide the institution with the voluntary assistance which it needs while at the same time having meaningful interaction with their communities and the world of work.

PLANNING THE VOLUNTEER PROGRAM

The effective utilization of older persons as school volunteers can come about only if time and energy are invested in planning the volunteer program. During the planning stage it will be necessary to:

- ascertain administration and staff support for a senior volunteer program;
- establish linkages with existing community agencies or groups whose support will be needed for the success of the program; and
- commit institutional resources to the operation of the program.

One of the most effective means for performing the above activities is to establish a planning task force or advisory group for the senior volunteer program. Appropriate representatives on the task force include:

- Members of the vocational education general advisory council;
- Educational administrators;
- Instructors;
- Local government representatives;
- Voluntary Action Center representatives;
- Community senior volunteer program representatives;
- Representatives of area agencies on aging;
- Senior Citizen Center representatives;
- Local school volunteer program coordinators;
- Parent Teacher Association representatives.

The roles and duties of the advisory group will depend partially upon where it is located in the organizational structure. Advisory groups that provide input into the office of the school superintendent or the president of the institution can be expected to be more involved with district-wide policies, purposes, objectives and procedures governing the senior volunteer program. In contrast, advisory groups that provide input to a school coordinator of vocational education, a principal, or a school-based coordinator of volunteers can be expected to be more concerned with operational details such as the specification of roles and duties of senior volunteers, volunteer recruitment, orientation and training procedures, and other topics associated with the operation of the school's senior volunteer program. The literature on this topic tends to support the creation of a district-wide advisory group if more than one school within the district is expected to become involved in the senior volunteer program.

Working with the advisory group, the district or institution will need to determine the feasibility of initiating a senior volunteer program. Questions to be resolved during this planning stage include the following:

- In what capacities could the school make the most effective utilization of senior volunteers?
- Can volunteers be involved in the program without jeopardizing the paid staff's perceptions of their job security and bargaining power?

Questions to be resolved *(continued)*

- Can the schools provide senior volunteers with assignments which they would find to be worthwhile and interesting?
- Will the school system assume responsibility for volunteers' out-of-pocket expenditures such as transportation and meals?
- Can the school district or institution provide accident and liability insurance for volunteers?
- Could the schools rely on an existing community volunteer program rather than create a separate senior volunteer program?
- Is the school district or institution able to hire or assign someone to coordinate the senior volunteer program?

If the answers to the above questions are favorable to the initiation of a senior volunteer program, then a needs assessment should be conducted to determine the schools' needs for senior volunteers. The needs assessment process will provide a means for potential supporters of the program to provide input into the planning of the program. This should serve to enhance their subsequent utilization of senior volunteers. As a result of the needs assessment, those involved in planning the program will have some concrete information upon which to base the goals and objectives of the senior volunteer program, the potential scope of activities to be performed by senior volunteers, and the types of skills to seek when recruiting volunteers.

As the plan begins to take shape, the expected scope of the program should be specified. Provisions will need to be made for the subsequent operation of the program, and particular attention must be given to assigning responsibility for coordination of the program. At least one person will probably need to devote from one half to full-time to the position of volunteer program coordinator. In most educational volunteer programs, the coordinator or director of volunteers is a salaried position. Some programs have relied on a volunteer to serve as coordinator on a temporary basis.

In addition to the costs associated with the coordinator's salary and fringe benefits, the district or institution will need to anticipate the other costs associated with operating a volunteer program. Some of the cost factors to consider when planning the program are listed below.

COST FACTORS

- Clerical help
- Office furniture and equipment
- Telephone service
- Postage
- Printing
- Routine office supplies
- Publicity
- Reimbursement for volunteers' transportation and meals
- Volunteer recognition events (dinners, plaques, etc.)
- Local travel to recruit volunteers
- Insurance costs for volunteers

Some of the above costs can be reduced significantly by utilizing existing resources or by relying on volunteers. Particular areas where savings might be possible include:

- Relying on volunteers or secretarial students on work study for secretarial and clerical assistance;
- Utilizing the school's graphic arts department for printing brochures, promotional materials, etc.;
- Using office furniture and equipment already available to the vocational education program;
- Relying heavily on existing community organizations for recruitment of senior volunteers;
- Relying on public service announcements and other free publicity for recruitment.

There will be costs associated with operating a senior volunteer program which cannot be avoided. However, when justifying the costs associated with operating the program, consideration should be given to the various benefits which can be expected.

EXPECTED BENEFITS

- Expertise applied on a temporary basis to institutional needs
- A wealth of career experiences to augment those of the paid staff
- Greater flexibility in the temporary assignment of persons to tasks than would be possible with regular paid personnel
- The potential for increased individualized attention given to students
- Expanded ties with the community
- The provision of worthwhile and rewarding experiences to older persons

OPERATION OF A SENIOR VOLUNTEER PROGRAM

A complete description of the operation of a senior volunteer program is beyond the scope of this handbook. However, the major steps involved in operating an educational volunteer program are as follows:

STEP 1

Orient staff to the purpose and planned activities of the program

STEP 2

Establish community support for the program

STEP 3

Identify specific needs for assistance from senior volunteers

STEP 4

Recruit senior volunteers

STEP 5

Screen and select volunteer applicants

STEP 6

Orient and train volunteers

STEP 7

Place volunteers in assignments

STEP 8

Monitor program performance

STEP 1. ORIENT STAFF

The orientation of the school staff to the senior volunteer program serves to stimulate staff interest in and support for the program. Orientation can begin with a printed announcement describing the program, followed by staff orientation sessions. These sessions serve to alleviate staff concerns about the role of senior volunteers and clarify the means by which volunteers will be recruited and assigned. It is imperative that the staff understand that volunteers will only be assigned to staff members who request assistance; no one will be required to participate if they prefer not to do so. Other pertinent topics to address during staff orientation sessions concern biases or stereotypes regarding older persons or volunteers in general, such as:

- Older people are too feeble to be of much help;
- Older people are too set in their ways to adjust to new demands;
- Retirees are out of touch with the world of work;
- Volunteers are not dependable;
- Working with volunteers is difficult.

Operational details regarding the program should be addressed during staff orientation sessions. Topics for inclusion in the presentation might include:

- Services provided by the volunteer program coordinator and staff;
- Volunteer recruitment, screening, selection, training and placement procedures;
- Pre service planning for staff requesting volunteers;
- Instructors' responsibilities in working with volunteers;
- Problem resolution procedures;
- Identifying your needs for volunteer assistance;
- Student orientation to interacting with volunteers.

STEP 2. ESTABLISH COMMUNITY SUPPORT

Establishing community support for the program should be a continuing activity which starts during the program planning stages and continues to be nurtured throughout the duration of program activities. Community representatives who were involved in planning the program should be recognized for their

contribution to the planning effort and kept informed of the progress being made. Other community organizations involved in voluntary action and/or senior citizen concerns should be contacted and made aware of the purpose of the program and the benefits which it can bring to the school and the community. Appropriate agencies might include:

- Voluntary Action Centers;
- Community Agencies on Aging;
- Senior Citizen Centers;
- Retired Senior Volunteer Programs (RSVP);
- County Offices on Aging;
- Coordinating Councils for Senior Citizens.

Obtaining support from individual members of the community can begin prior to recruitment and continue thereafter on a regular basis. Indirect approaches such as newspaper articles, talk shows, television news coverage, bumper stickers, billboards and numerous other means can be used to alert the public to the existence and purposes of the volunteer program.

STEP 3. IDENTIFY NEEDS FOR VOLUNTEERS

The identification of specific needs for volunteer assistance is a prelude to recruitment. The steps involved in creating volunteer jobs are similar to those discussed in job creation in Chapter Seven. Persons requesting volunteer assistance must be told that it may take some time to fill their requests; otherwise, staff support for the program can be jeopardized.

STEP 4. RECRUIT SENIOR VOLUNTEERS

Recruitment of senior volunteers is similar in some respects to the development of community support for the volunteer program, although the purpose of the latter is much broader than recruiting volunteers. Through various recruitment procedures, older persons are not only informed of the purposes of the program, they are also made aware of the types of volunteer skills or services needed and are asked to help in meeting those needs.

Recruitment procedures can be classified into three major categories:

Individual Approaches:	Telephone calls, word of mouth, direct mailings, door-to-door contacts
Group Approaches:	Presentations to groups, recruitment meetings, open houses, bulletin boards, announcements in organizational newsletters
Public Approaches:	Television and radio, newspapers, bumper stickers, billboards, posters in public places

In general, group and public approaches reach a larger segment of the community than do individual approaches; however, individual recruitment strategies can be more targeted and are likely to be most effective when specific skills are needed which are possessed by only a small segment of the population. When an individual approach is utilized, recruiters should be selected who are capable of generating enthusiasm and interest on the part of the potential volunteer. Oftentimes volunteers who have participated in the program can become effective recruiters.

STEP 5. SCREEN AND SELECT APPLICANTS

Following recruitment, volunteers must be screened to make sure they meet the general qualifications needed for all employees, voluntary or not. These general qualifications may include standards of health, reliability and the ability to work with others. Personal interviews are the recommended procedure to use in screening volunteer applicants. This screening and selection process is particularly important where group or public recruitment strategies have been used, since the volunteer program office or its recruiter(s) will not have had a previous opportunity to interact with the applicants.

In addition, applicants must meet the specific qualifications associated with a particular assignment. While it may at first seem unnecessary to thoroughly screen applicants who are willing to work for "free," it is important that the students, paid staff and other volunteers not be assigned a new volunteer who is not qualified or capable of handling the assignment.

STEP 6. PLACE VOLUNTEERS

The placement of a volunteer can occur either at the time of screening and selection or some time later when an appropriate position becomes available. Placement entails matching the qualifications of the volunteer with the requirements of volunteer assignments. Among the factors to consider in making this match are:

- skills and interests;
- willingness to acquire new skills;
- time requirements;
- scheduling;
- travel distance or transportation problems.

Considerable effort should be given to avoiding underplacement of volunteers, since it often results in dissatisfaction and subsequent termination. It is better to wait for an appropriate match between the volunteer and an assignment than to rush into a placement which is likely to result in disappointment on the part of both the volunteer and the staff.

STEP 7. ORIENT AND TRAIN VOLUNTEERS

Applicants who are selected to serve as senior volunteers should receive some type of orientation and training prior to beginning their assignment. Orientation provides the new volunteer with general information on school policies and rules pertaining to volunteers; the role, rights and responsibilities of volunteers; and procedural aspects such as signing in and out, where to park at the school, whom to contact if they are ill or otherwise cannot attend, and where to go for help should it be needed. Training, either pre-service or in-service training, may be needed to provide the volunteer with specific information that is necessary to perform the duties of the volunteer's assignment. Examples of potential training topics include:

- safety in shop or laboratory areas;
- providing positive reinforcement to students, instructional techniques;
- operating various types of equipment.

Training topics should be tailored to the specific needs of the volunteers, and the amount of time devoted to training should be kept to a minimum.

STEP 8. FOLLOW-UP

Procedures should be established for monitoring the performance of each volunteer. During the first few weeks after an assignment, the volunteer coordinator should check to make sure that the volunteer is satisfied with the assignment and that the staff is satisfied with the volunteer's performance. If any difficulty arises, it is important for the volunteer to know that the person responsible for placement is truly interested in helping. Similarly, if the staff working with the volunteer is not satisfied with the assignment, it is the responsibility of the volunteer coordinator to remedy the situation, even if that requires replacing the volunteer.

The performance of older volunteers will need to be monitored in order to determine the benefits which the school has received as a result of its senior volunteer program. The resources required to operate the volunteer program will continually need to be justified, and that justification can best be prepared by having evidence of the progress which has resulted from the involvement of senior volunteers.

NOTES

[1]Warmbrod, Catherine P. and Hannah R. Eisner. *Operating a Retirees Volunteer Program in Postsecondary Institutions: A Resource Handbook.* Columbus, OH: National Center for Research in Vocational Education, 1979.

[2]Jacobs, H. Lee, "Education for Aging in the Elementary and Secondary School System," in Grabowski, Stanley and W. Dean Mason, eds. *Learning for Aging.* Washington, DC: Adult Education Association of the USA, 1977.

[3]*Older School Volunteers Care Summaries, Los Angeles, Miami, New York.* Alexandria, VA: National School Volunteer Program, Inc., [1976].

[4]Davis, Sarah A., *Volunteers, Tutorial and DOVES Services in the Los Angeles Unified Schools Office of Instruction, a Kaleidoscope of 1978-79.* Los Angeles, CA: Los Angeles Unified School District, 1979.

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